



HEALTH AFFAIRS



# Protected Health Information Management Tool (PHIMT)

Quarterly Training

February 2005

TMA Privacy Office

*This document contains proprietary information and will be handled within Government regulations.  
It is intended solely for the use and information of the Military Health System.*

# Agenda

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- Overview of PHIMT
- PHIMT User Interface
- User Admin Functionality
- Privacy Specialist/Regular User Functionality
- Administrative Summary

# Training Objectives

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- Once you have completed this course, you will be able to:
  - Describe the PHIMT application
  - Identify the user roles and permissions
  - Perform the functions of the User Admin, Privacy Specialist, and Regular User within the PHIMT

# PHIMT Overview

# Objectives

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- Upon completion of this lesson, you will be familiar with the:
  - Commercial Off The Shelf (COTS) product customization
  - PHIMT Terminology
  - User roles and associated permissions
  - Hierarchy

# Customized COTS Product

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- COTS product built for HIPAA Privacy
- Browser-based
- Centrally administered
- Shared database
- Designed to perform fundamental tasks
  - Accounting of Disclosures
  - Record retrieval requirements
- Consolidation of multiple tasks into an electronic environment

# Terminology

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- **User** - an individual with a unique login ID and Password assigned to an organization within the tool
- **Organization** - a logical or physical entity such as an MTF, a Service or TRICARE Management Activity
- **Role** - a named collection of permissions within the tool  
A user can have the same roles in multiple organizations, or different roles in multiple organizations

# User Roles and Permissions

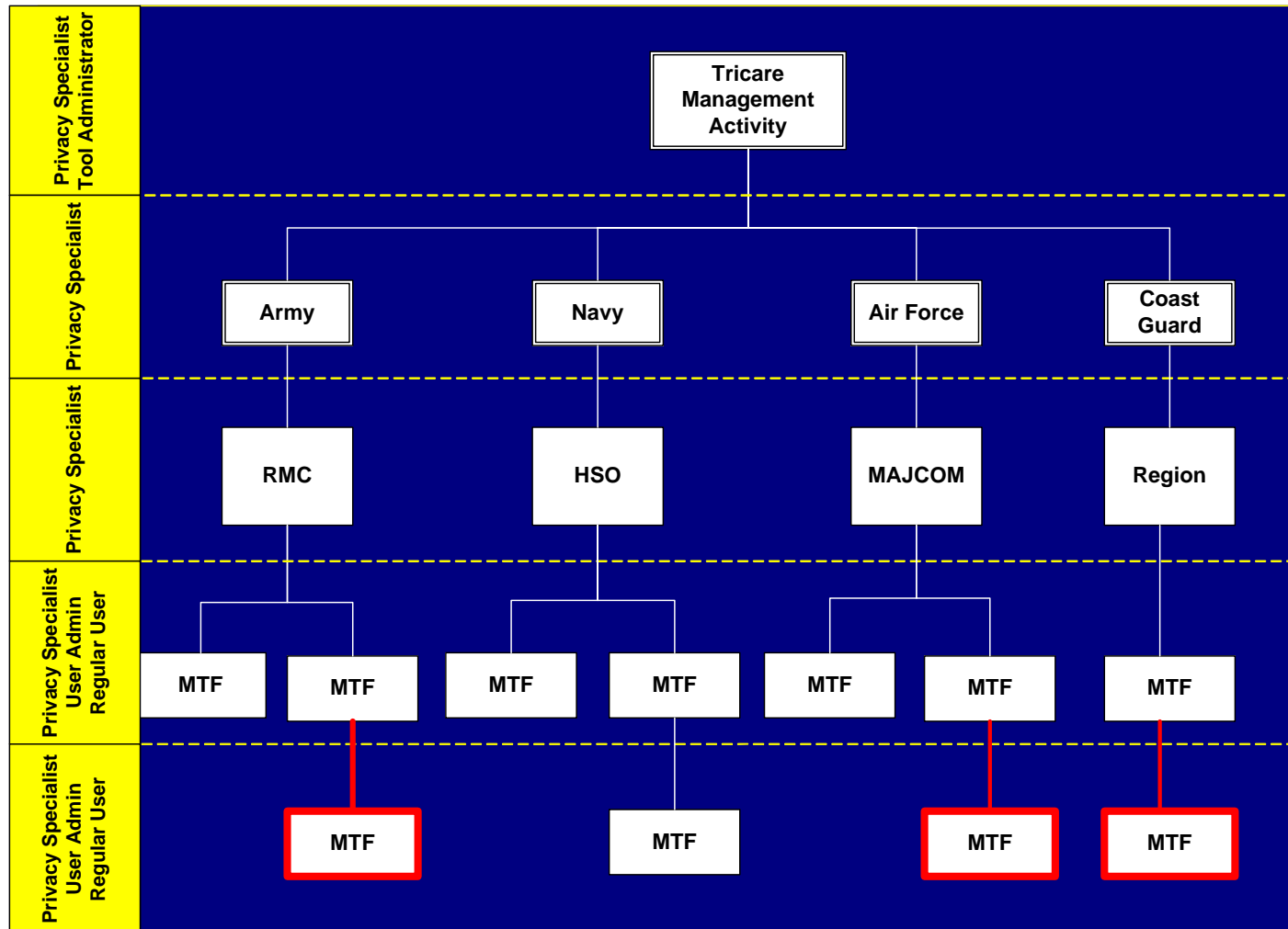
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- **User Admin** is a local admin for an MTF or a designated Service. This role allows one to add/modify users from within their Service and assign roles. This role will be handled by the email account administrators for each MTF or Service
- **Privacy Specialist** is the Privacy Officer or designee at an MTF or Service level. This role allows the user to maintain disclosure reporting, approve/deny disclosure requests, amendments to requests, restrictions to disclosures, disclosure suspensions and generate associated letters
- **Regular User** is a general role with basic functionality. This role can create disclosures and authorization requests that can be routed on to a Privacy Specialist



# PHIMT Overview

## Hierarchy



\*   These do not exist at this point, but can be added to the PHIMT

# PHIMT Overview

## Summary

---

- You should now be familiar with the:
  - COTS product customization
  - PHIMT Terminology
  - User roles and associated permissions
  - Hierarchy

# **PHIMT User Interface**

# PHIMT User Interface

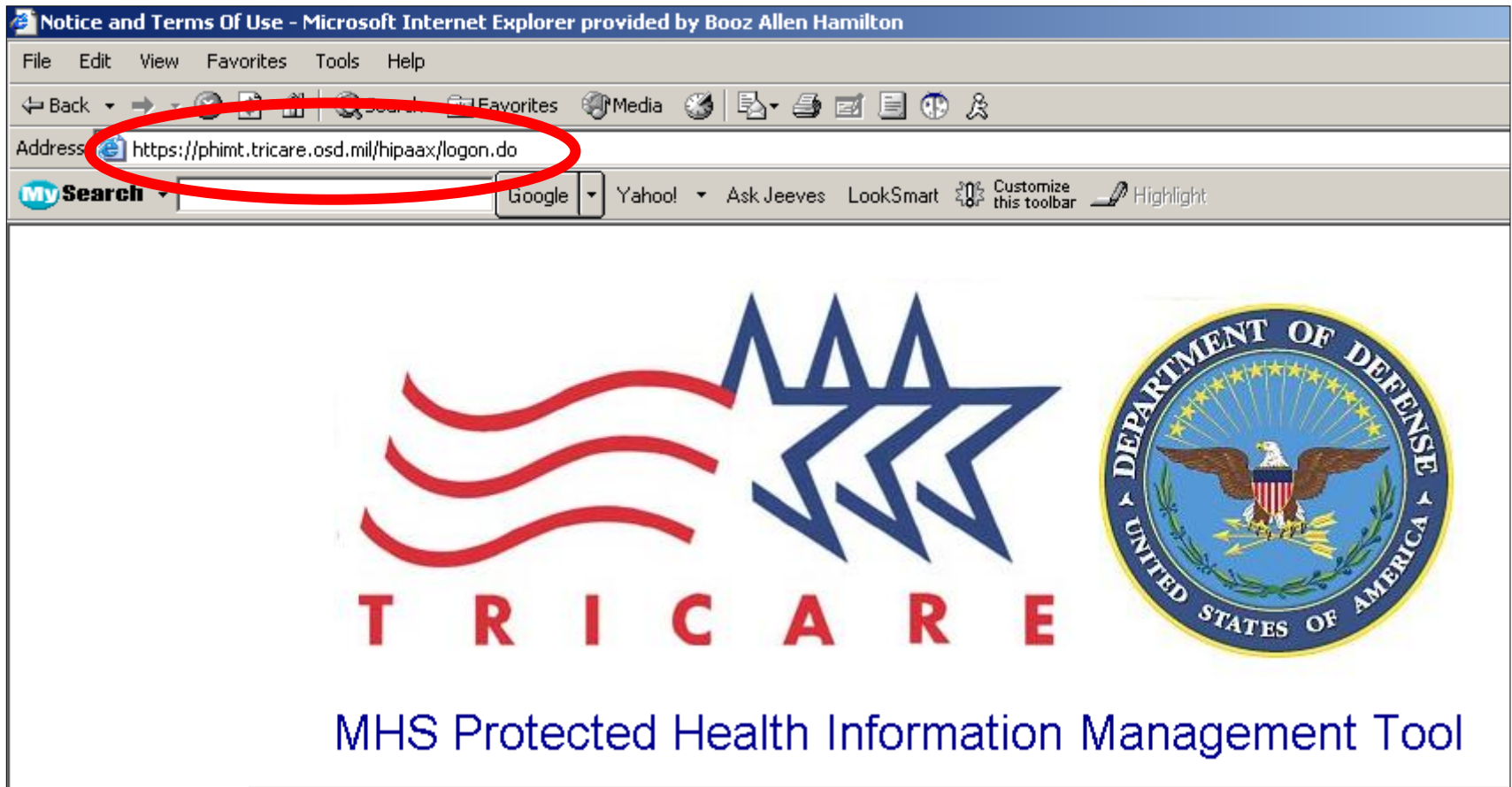
## Objectives

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- Upon completion of this lesson, you will be able to locate the:
  - Login Screen
  - Patient Tab
  - User Tab
  - Admin Tab
  - Requests Tab
  - Requester Tab

# PHIMT User Interface Login Screen

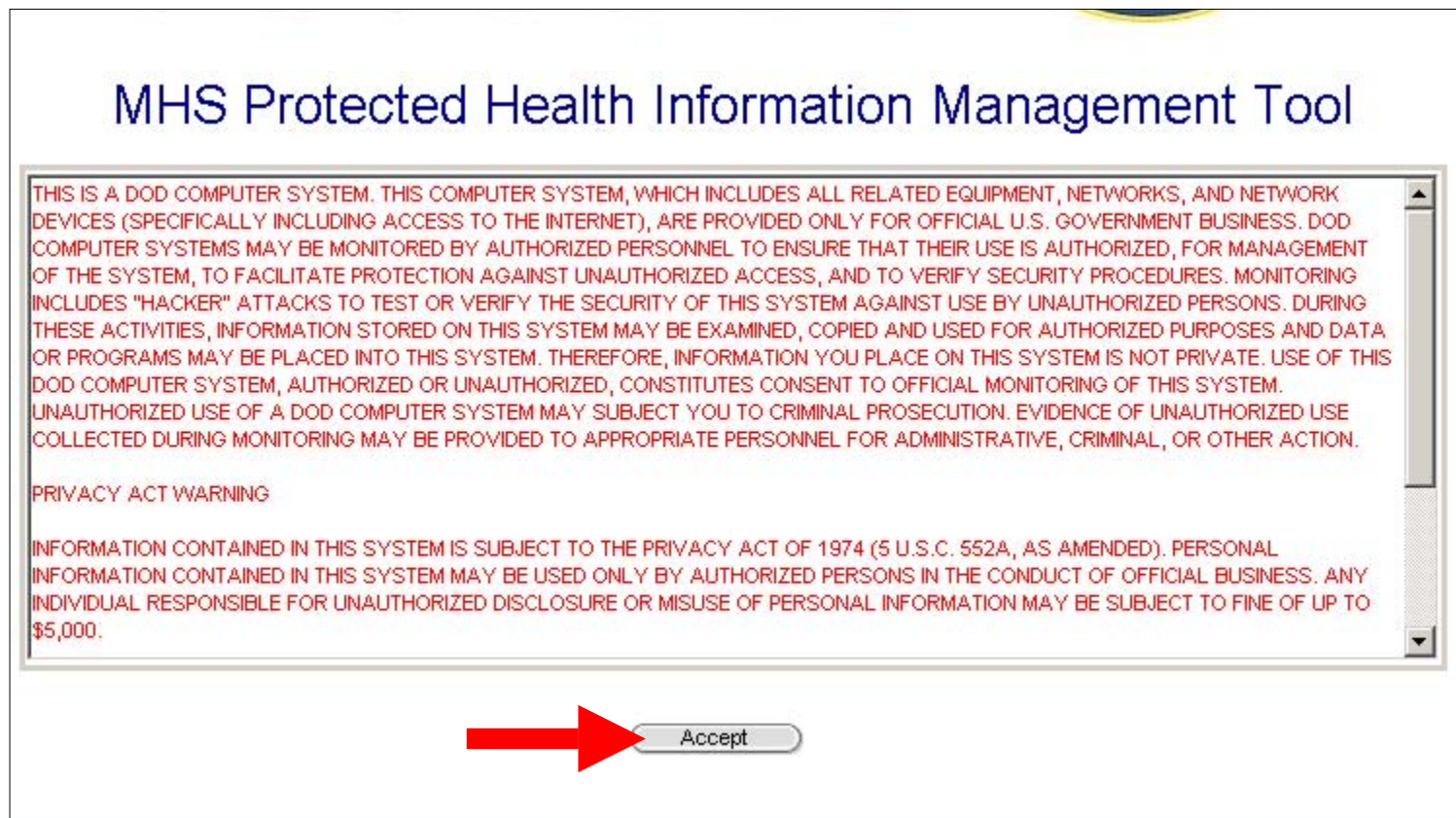
1. Enter the URL: <https://phimt.tricare.osd.mil>



# PHIMT User Interface

## Login Screen

2. Read the Notice and Terms of Use
3. Click on the **Accept** button



# PHIMT User Interface

## Login Screen

3. Type in User Name and Password
4. Click on the [Login](#) button



MHS Protected Health Information Management  
Tool

You are logging into the production server.  
Information in this version will be retained.

User Name:

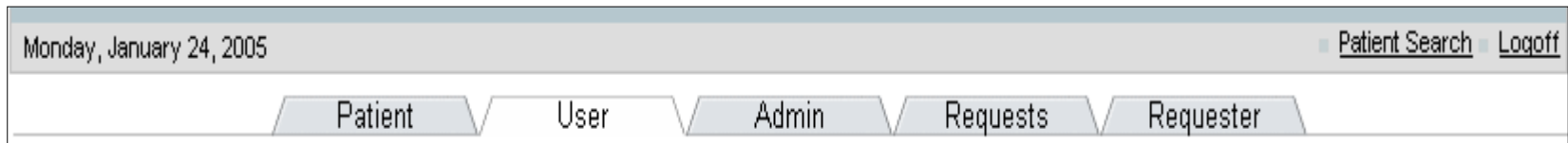
Password:

Login

Enter your User Name and Password to login.

# PHIMT User Interface

## Tabs



- Patient
- User
- Admin
- Requests
- Requester



# PHIMT User Interface

## Patient Tab

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

**Patient** User Admin Requests Requester

**Current Patient:**  
None

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Patient Search

**FMP-SSSN** (*Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format)*)

-  -  -

- OR -

**by Name** (*Last*) (*First*)

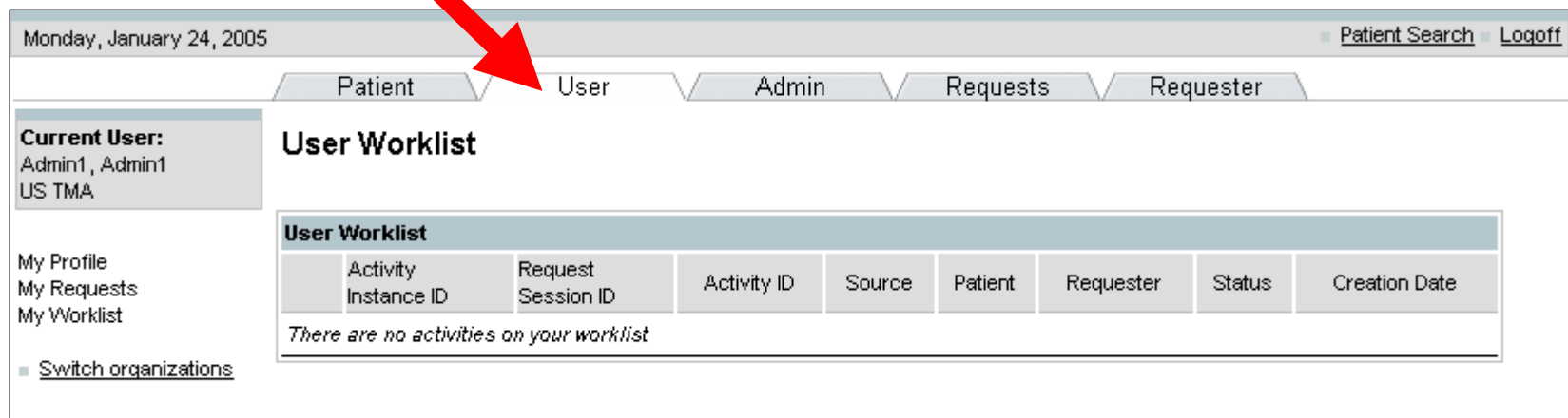
,

- OR -

**by System ID** (*the identifier created by this system for the person*)

# PHIMT User Interface

## User Tab



Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

**Navigation Tabs:** Patient **User** Admin Requests Requester

**Current User:**  
Admin1, Admin1  
US TMA

**User Worklist**

My Profile  
My Requests  
My Worklist

[Switch organizations](#)

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
<i>There are no activities on your worklist</i>							

# PHIMT User Interface

## Admin Tab



Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

Patient User **Admin** Requests Requester

**Current Admin:**  
Admin1, Admin1  
US TMA

**Administrative Summary**

Origin Organizations

Administrative Summary  
Administrative Statistics  
Organizations  
Queue Users  
Disclosure Imports  
Disclosure Imports History

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# PHIMT User Interface

## Requests Tab

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin **Requests** Requester

**Current Request:**  
None

- Create New Request
- Search for a Request

**Create New Request**

**Select Request Type**

☐ Complaint

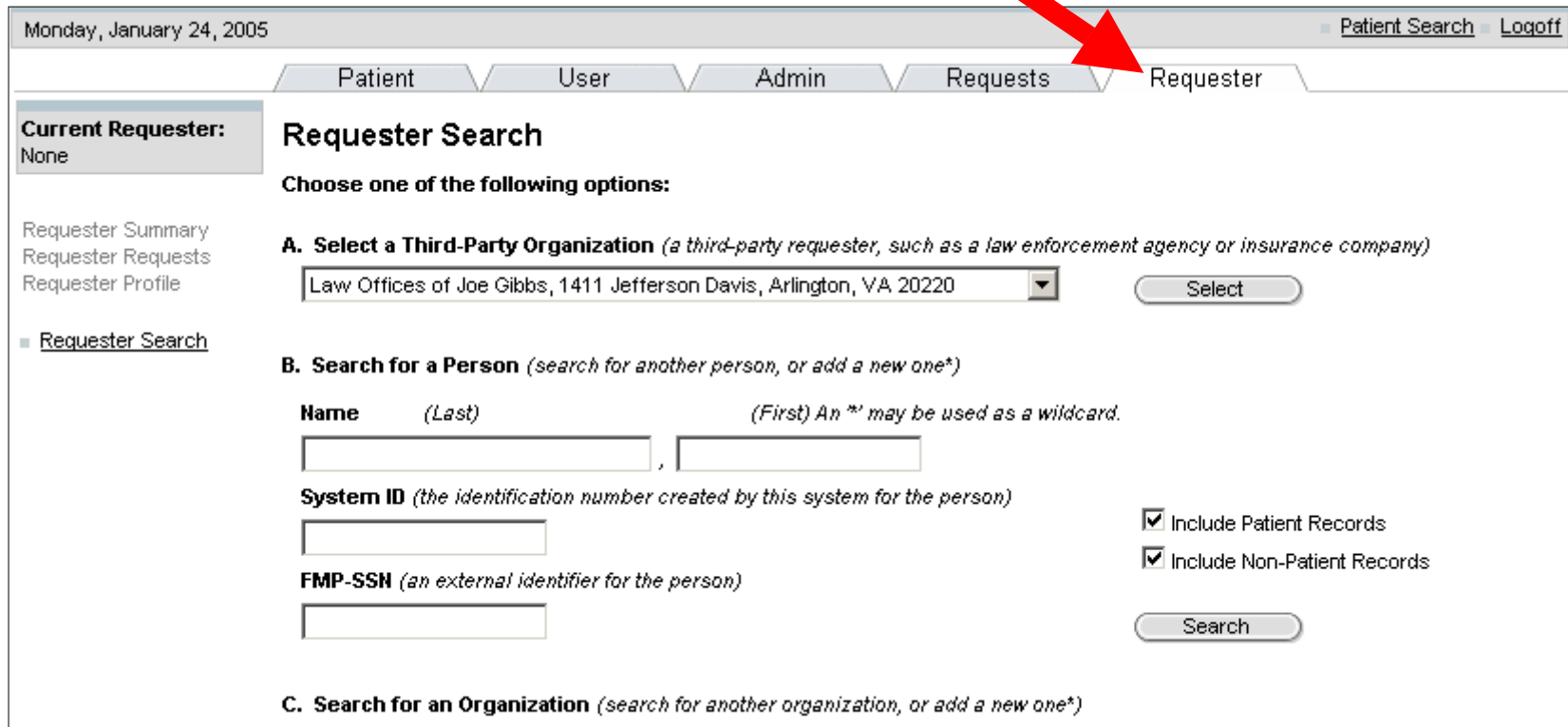
☐ Disclosure

☒ Disclosure Accounting

Next

# PHIMT User Interface

## Requester Tab



Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) **[Requester](#)**

**Current Requester:**  
None

**Requester Search**

Choose one of the following options:

**A. Select a Third-Party Organization** *(a third-party requester, such as a law enforcement agency or insurance company)*

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

**B. Search for a Person** *(search for another person, or add a new one\*)*

**Name** (Last) (First) *An '\*' may be used as a wildcard.*

,

**System ID** *(the identification number created by this system for the person)*

**FMP-SSN** *(an external identifier for the person)*

☒ Include Patient Records  
☒ Include Non-Patient Records

**C. Search for an Organization** *(search for another organization, or add a new one\*)*

# PHIMT User Interface

## Summary

---

- You should now be able to locate the:
  - Login Screen
  - Patient Tab
  - User Tab
  - Admin Tab
  - Requests Tab
  - Requester Tab

# **User Admin Functionality**

# User Admin Functionality

## Objectives

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- Upon completion of this lesson, you will be able to:
  - Describe the process of obtaining a User Admin account
  - Create user accounts
  - Setup a workflow
  - Setup a queue
  - Create requester favorites
  - Disable users
  - Transfer users



# Obtain a User Admin Account

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- Requests for User Admins to be created must be routed to and approved by the Service Representative
- The Service Representative will route the approved request to the HIPAA Support Center
- The HIPAA Support Center will establish the User Admin account and provide the User Admin login information to the appropriate individual

# Create User Accounts

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- The User Admin is responsible for adding users and assigning roles to the users within their organization
- User Admin provides the user with their login information
- Determined by Service specific requirements or MTF requirements

# User ID and Password Requirements

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- User ID:
  - Assigned by the User Admin, usually first initial of the first name and complete last name (follow Service guidelines)
  - Duplicate User Name not allowed by the application
- Password:
  - 8-15 characters long and must contain at least one
  - Alphabetical uppercase character
  - Alphabetical lower case character
  - Arabic numeral (0, 1, 2, 3, 4)
  - Non-alphanumeric special character (I.e. !, @, #, \$, etc.)

# User Admin Functionality

## Create User Accounts (1 of 3)

1. Select the [Admin Tab](#)
2. Select the [Add User](#) hyperlink

Monday, January 24, 2005 [Logoff](#)

User Admin 

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
<a href="#">1006</a>	10th MED GROUP-USAF ACADEMY CO	USAFA	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<a href="#">1109</a>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<a href="#">967</a>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<a href="#">1070</a>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		

# Create User Accounts (2 of 3)

3. Enter user information (name, phone number and email address)
4. Enter a unique User ID (No duplicate IDs are allowed across all Services)

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Profile

**\* Name** (Last) (First) (Middle) (Sr./Jr.)  
Miller Erin

**Phone Number** (area code, phone number(XXX-XXXX), and extension if applicable)  
*(Please note, this phone number will be displayed on letters as contact information.)*  
(703) 555-3231 ext.

**System ID** (the identifier created by this system for the person)  
0

**\* User ID** (user login name)  
emiller

**Email** (example: johnf@yahoo.com)  
erin.miller@tma.osd.mil

## User Admin Functionality

# Create User Accounts (3 of 3)

5. Enter a temporary new password and confirm new password
6. Select organization from the drop-down box and select the appropriate user role
7. Click on the **Save** button

The screenshot shows a web form for creating user accounts. A red box highlights the 'New Password' and 'Confirm New Password' fields, both containing asterisks. Another red box highlights the 'User Roles' section, which includes an 'Organization' dropdown menu set to 'US TMA' and a row of checkboxes for 'Privacy Specialist', 'Regular User' (checked), 'User Admin', and 'Primary'. A red arrow points from a text box on the right to the 'Signature Block' field. A red arrow points from the bottom left to the 'Save' button.

**New Password**  
\*\*\*\*\*

**Confirm New Password**  
\*\*\*\*\*

**Signature Block** *(Please note, this text will display in a letter's signature block.)*

**Comments** *(general comments about or for the user)*

**User Roles**

Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

**Save**

Users can update the information in the signature block from their User Profile. Follow Service specific requirements

# Workflow Setup (1 of 6)

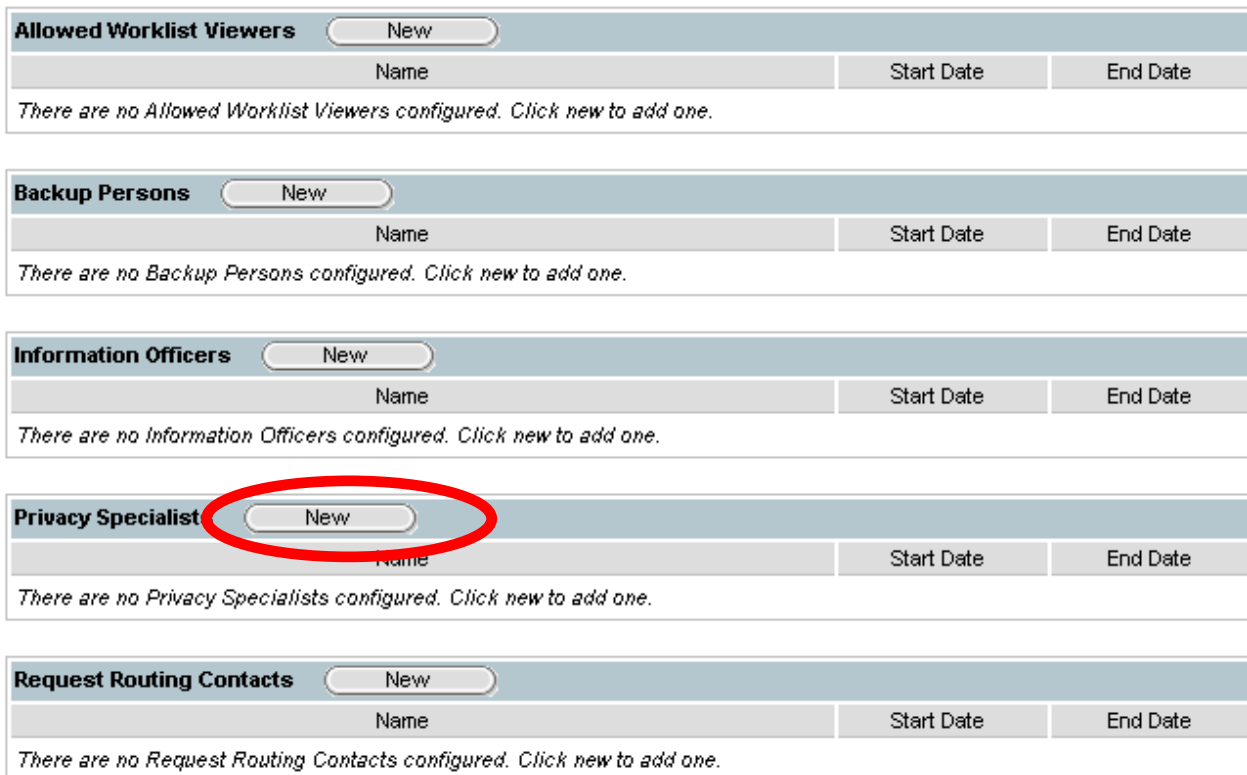
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- Once a user has been added and their organization and user role is established, the User Admin can establish the workflow for that user's disclosures
- The workflow delineates the process by which requests are routed within the system
- Workflows should be set up so that a Regular Users work will be routed to a Privacy Specialist for approval or denial

## User Admin Functionality

# Workflow Setup (2 of 6)

1. Scroll to the bottom of the User Profile screen
2. Click on the **New** button next to Privacy Specialists



**Allowed Worklist Viewers** [New](#)

Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

**Backup Persons** [New](#)

Name	Start Date	End Date
There are no Backup Persons configured. Click new to add one.		

**Information Officers** [New](#)

Name	Start Date	End Date
There are no Information Officers configured. Click new to add one.		

**Privacy Specialist** [New](#)

Name	Start Date	End Date
There are no Privacy Specialists configured. Click new to add one.		

**Request Routing Contacts** [New](#)

Name	Start Date	End Date
There are no Request Routing Contacts configured. Click new to add one.		



# User Admin Functionality

## Workflow Setup (3 of 6)

3. Enter search criteria
4. Click on the **Search** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Profile \ User Search

Name (Last)	(First)
<input type="text" value="Wilson"/>	<input type="text" value="James"/>

**System ID** *(the identifier created by this system for the person)*

# User Admin Functionality

## Workflow Setup (4 of 6)

5. Select the appropriate Privacy Specialist from the search results and click on the **Select** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Profile \ User Search

Search Results					
ID	Name	SSN	Birth Date	Address	
504	Wilson, James				

**Select**

**Other options:**  
[Adjust your search criteria and try again.](#)

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## User Admin Functionality

# Workflow Setup (5 of 6)

6. Set Relationship Start Date / End Date (End Date optional)
7. Click on the **Save** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Profile \ Privacy Specialist Details

**Related Person:** James Wilson

**Relationship Start Date** (MANDATORY: the date when the relationship began or will begin)  
01/24/2005

**Relationship End Date** (OPTIONAL: the date when the relationship ended or will end)

**Save**

# User Admin Functionality

## Workflow Setup (6 of 6)

### 8. Privacy Specialist is added to the User Profile screen

Allowed Worklist Viewers <a href="#">New</a>		
Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

Backup Persons <a href="#">New</a>		
Name	Start Date	End Date
There are no Backup Persons configured. Click new to add one.		

Information Officers <a href="#">New</a>		
Name	Start Date	End Date
There are no Information Officers configured. Click new to add one.		

Privacy Specialists <a href="#">New</a>		
Name	Start Date	End Date
<u>James Wilson</u>	01/24/2005	

Request Routing Contacts <a href="#">New</a>		
Name	Start Date	End Date
There are no Request Routing Contacts configured. Click new to add one.		

# Queue Setup (1 of 8)

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- A queue is a distribution list for a specific organization that is comprised of two or more Privacy Specialists
- The User Admin at the local command sets up queues
- Queues are created to expedite the process of approving/denying a disclosure
- Only users affiliated with a given organization will see that organization's routing options

# User Admin Functionality

## Queue Setup (2 of 8)

1. Select **Admin Tab**
2. Select the **Queue Users** hyperlink

Monday, January 24, 2005 [Logoff](#)

**User** **Admin** 

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
<a href="#">1006</a>	10th MED GROUP-USAF ACADEMY CO	USAFA	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<a href="#">1109</a>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<a href="#">967</a>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<a href="#">1070</a>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
<a href="#">833</a>	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		

# User Admin Functionality

## Queue Setup (3 of 8)

3. Click on the **Modify** button to add a new queue

The screenshot shows a web application interface for user administration. At the top, there's a header bar with the date "Tuesday, January 25, 2005" and a "Logoff" link. Below the header, there are two tabs: "User" and "Admin". The "User" tab is selected.

On the left side, there's a sidebar with the following content:

- Current Admin:** Scovel, Natalie, US TMA
- Organizations
- Application Users
- Queue Users
  - User Search
  - Add User

The main content area is titled "Queue Users". It features a "User Queue" dropdown menu set to "TMA, Medical Clinic". To the right of this dropdown is a "Modify" button, which is highlighted by a red arrow. Below the "User Queue" dropdown, there are two sections:

- Queue Members:** A list of users: Joe Jones, Joe Miller, Joe Smith, and Pradeep Thaivalappil.
- All Other Users:** A list of users: Admin 53, Admin Admin, User Admin, Mike Beedle, Christopher Brown, Ted Brown, Vince Carter, Andy Cirillo, Amanda Colantuoni, Laverneus Coles, Liza Dorsey, Amanda Dunlap, Chad Michael Dunlap, Chad Michael Dunlap, Chad Michael Dunlap, Chris Foster, Sarkis H Jalkian, Sarkis Jalkian, Joe Johnson, and First Middle Last.

Between the "Queue Members" and "All Other Users" lists, there are two buttons: "Enable" and "Disable".

# User Admin Functionality

## Queue Setup (4 of 8)

### 4. Click on **New**

Tuesday, January 25, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Queues

**User Queues**

ID	Queue Name
1	<input type="text" value="TMA Medical Clinic"/>

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# User Admin Functionality

## Queue Setup (5 of 8)

5. Enter the description of Queue in the text box
6. Click on the **Save** button (screen will not change)
7. Once saved, select the **Queue Users** hyperlink

Tuesday, January 25, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
**Queue Users**

[User Search](#)  
[Add User](#)

### User Queues

[New](#)

ID	Queue Name
1	TMA Medical Clinic
24	Naval Hospital

[Save](#)

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# User Admin Functionality

## Queue Setup (6 of 8)

8. Select the Queue you created from the drop-down box

Tuesday, January 25, 2005 [Logoff](#)


**User** Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Queue Users

**User Queue** TMA Medical Clinic   
TMA Medical Clinic  
Naval Hospital

**Queue Members**

Joe Jones
Joe Miller
Joe Smith
Pradeep Thaivalappil

**All Other Users**

Admin 53
Admin Admin
User Admin
Mike Beedle
Christopher Brown
Ted Brown
Vince Carter
Andy Cirillo
Amanda Colantuoni
Laverneus Coles
Liza Dorsey
Amanda Dunlap
Chad Michael Dunlap
Chad Michael Dunlap
Chad Michael Dunlap
Chris Foster
Sarkis H Jalkian
Sarkis Jalkian
Joe Johnson

[← Enable](#) [→ Disable](#) [Modify](#)

# User Admin Functionality

## Queue Setup (7 of 8)

9. Select the users that you want to add to the queue and click on **Enable**
10. Click on the **Save** button

**Current Admin:**  
Scovel, Natalie  
US TMA

**Queue Users**

User Queue: Naval Hospital [Modify]

**Queue Members**

- Chad Michael Dunlap
- Erin Miller
- James Wilson
- Clinton Portis

**All Other Users**

- Admin 53
- Admin Admin
- Admin3 Admin3
- Admin4 Admin4
- Admin5 Admin5
- Admin6 Admin6
- Admin7 Admin7
- Admin8 Admin8
- Amanda Colantuoni
- Amanda Dunlap
- Amanda Ford
- Andy Cirillo
- Chad Michael Dunlap
- Chad Michael Dunlap
- Chris Foster
- Christopher Brown
- First Middle Last
- Fred Thomas
- Igor Mameshin
- Joe Johnson
- Joe Jones
- Joe Miller
- Joe Smith
- Kevin York
- Laverneus Coles
- Liza Dorsey
- Mike Beedle
- Mouse Mickey
- Natalie Scovel
- Natalie Scovel

**Buttons:** Enable, Disable, Save

# User Admin Functionality

## Queue Setup (8 of 8)

11. The Queue that you added will show up in the user's worklist

Tuesday, January 25, 2005 [Logoff](#)

User Admin

**Current User:**  
Scovel, Natalie  
US TMA

My Profile  
My Requests  
My Worklist

[Switch organizations](#)

### User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities on your worklist							

### Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

Accept

# Requester Favorites

---

- An organization can create a list of requester "favorites" that show up in the requester drop-down list box
- User Admins can set up the list of favorites per organization
- If an organization name is not in the favorites list, the user will be allowed to search for it manually
- A given "requester" can appear in multiple "favorites" lists

# Requester Favorites- Searching for Organization (1 of 5)

### 1. Select the Admin Tab



The screenshot displays the 'User Admin' interface. At the top, a header bar shows the date 'Monday, January 24, 2005' and a 'Logoff' link. Below the header, there are two tabs: 'User' and 'Admin'. A red arrow points to the 'Admin' tab, indicating it should be selected. On the left side, there is a sidebar with the following content: 'Current User: Scovel, Natalie US TMA', a list of links ('My Profile', 'My Requests', 'My Worklist'), and a link 'Switch organizations'. The main content area is titled 'User Worklist' and contains a table with the following columns: 'Activity Instance ID', 'Request Session ID', 'Activity ID', 'Source', 'Patient', 'Requester', 'Status', and 'Creation Date'. Below the table, a message states 'There are no activities on your worklist'. At the bottom of the page, a footer contains the copyright information: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED' and 'Version: 2.24'.

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current User:**  
Scovel, Natalie  
US TMA

[My Profile](#)  
[My Requests](#)  
[My Worklist](#)

[Switch organizations](#)

### User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
<i>There are no activities on your worklist</i>							

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# Requester Favorites- Searching for Organization (2 of 5)

2. Select the [Organizations](#) hyperlink
3. Select the [ID](#) hyperlink for your Origin Organization

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

**Organizations**

[Organizations](#)  
[Application Users](#)  
[Queue Users](#)

[User Search](#)  
[Add User](#)

**Origin Organizations**

ID	Name	Parent Name	Address	Contact Person	Contact Phone
<a href="#">1006</a>	10th MED GROUP-USAF ACADEMY CO	USAF A	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<a href="#">1070</a>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<a href="#">917</a>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<a href="#">1070</a>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		

# Requester Favorites- Searching for Organization (3 of 5)

4. Scroll down to Favored Requesters and click on the [Add](#) button

**Contact People**

ID	Name	Phone	Address	Primary
<i>There are currently no contact people associated with this organization. Click new to add one.</i>				

**Child Organizations**

ID	Name	Address	Contact Person	Contact Phone	Active
<i>There are currently no child organizations associated with this organization. Click new to add one.</i>					

**Favored Requester**

ID	Name	Address
<i>There are currently no favored requesters associated with this organization. Click new to add one.</i>		

**Associated Addresses**

ID	Street	City	State	Zip	Alternate	Primary
<u>709</u>	4102 Pinion Drive Ste 4000	USAF Academy	CO	80840	No	<input checked="" type="radio"/>



# Requester Favorites- Searching for Organization (4 of 5)

5. Enter organization search criteria
6. Click on the **Search** button

Monday, January 24, 2005 [Logoff](#)

**User** Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Requester Search

Choose one of the following options:

**A. Select a Third-Party Organization** (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

**B. Search for a Person** (search for another person, or add a new one\*)

**Name** (Last) (First) An "\*" may be used as a wildcard.  
 ,

**System ID** (the identification number created by this system for the person)

**FMP-SSN** (an external identifier for the person)

☒ Include Patient Records  
☒ Include Non-Patient Records

**C. Search for an Organization** (search for another organization, or add a new one\*)

**Name** (All or part of the name of the organization. An "\*" may be used as a wildcard.)  
Law Offices of M. Mccarron

**DMIS Code** (the external identifier for the organization)

\* You must search for an existing requester or requesting organization before adding a new one.

# Requester Favorites- Searching for Organization (5 of 5)

7. If requester is not found, click on "Create a new requester as an organization"

Monday, January 24, 2005 [Logoff](#)

**User** Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Requester Search Results

Search Results		
ID	Name	Address
There were no results that matched your search criteria.		

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new requester as a person.](#)  
[Create a new requester as an organization.](#)

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# Requester Favorites- Adding New Organization (1 of 6)

8. Enter the name of the Organization
9. Select the organization type from the drop-down box

Monday, January 24, 2005 [Logoff](#)

**User** Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### Organization Details

**\* Name** *(is a subsidiary, start the organization name with its parent's name)*

**Type**

**DMIS Code** *(an optional alternative identifier for the organization)*

**Parent Organization**  
US TMA

**Alternate Communication Instructions** *(special instructions to send correspondence to the organization)*

# Requester Favorites- Adding New Organization (2 of 6)

10. Scroll down to the bottom of the screen and click on the **Save** button

**Parent Organization**  
US TMA

**Alternate Communication Instructions** *(special instructions to send correspondence to the organization)*

**Comments** *(general comments about or for the organization)*

**Primary** *(checked if the organization is primary)*  
☐

**Active** *(checked if the organization can be selected for authorizations, disclosures, etc.)*  
☒

**Origin** *(checked if the organization can be selected as an origin for disclosures)*  
☐

**Requester/Recipient** *(checked if the organization can be selected as a requester or recipient for disclosures or requests)*  
☒

# Requester Favorites- Adding New Organization (3 of 6)

11. Enter the Organization Address Details and click on the **Save** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

- [User Search](#)
- [Add User](#)

### Address Details

**Address Format** (APO and FPO address should use USA format)  
USA ☒ International ☐

\* **Address Line 1** (the primary address line)

**Address Line 2** (normally a suite or apartment)

\* **City** (city name, or APO or FPO)

\* **State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

\* **Postal Code** (USA: ##### - ####)  
 -

**Comments** (general comments about or for the address)

**Save**

# Requester Favorites- Adding New Organization (4 of 6)

- If you are entering a International address, select the International radio button

The screenshot shows a web application interface for 'User Admin'. At the top, there's a header bar with the date 'Monday, January 24, 2005' and a 'Logoff' link. Below the header, there are two tabs: 'User' and 'Admin'. The 'Admin' tab is selected. On the left side, there's a sidebar with the text 'Current Admin: [Name], [Name] S TMA' and a list of links: 'Organizations', 'Application Users', 'New Users', 'User Search', and 'Add User'. The main content area is titled 'Address Details'. It contains a section for 'Address Format' with a note '(APO and FPO address should use USA format)'. There are two radio buttons: 'USA' and 'International'. A red arrow points to the 'International' radio button. Below this is a 'Country' dropdown menu with 'Antigua' selected. There are three text input fields for 'International Address Line 1', 'International Address Line 2', and 'International Address Line 3'. At the bottom, there's a 'Comments' text area with a note '(general comments about or for the address)'. A 'Save' button is located at the bottom of the form.

# Requester Favorites- Adding New Organization (5 of 6)

- The organization that you added now appears in your requester favorites

**Contact People** 

ID	Name	Phone	Address	Primary
<i>There are currently no contact people associated with this organization. Click new to add one.</i>				


**Child Organizations** 

ID	Name	Address	Contact Person	Contact Phone	Active
<i>There are currently no child organizations associated with this organization. Click new to add one.</i>					

**Favored Requesters** 

ID	Name	Address	
<u>1220</u>	Law Offices of M. McCarron	123 Deer Ln., Arlington, VA 22345	<a href="#">remove</a>

**Associated Addresses** 

ID	Street	City	State	Zip	Alternate	Primary
<u>709</u>	4102 Pinion Drive Ste 4000	USAF Academy	CO	80840	No	

**Phone Numbers** 

ID	Phone	Comment	Active	Primary
<i>There are currently no phone numbers on record for this organization. Click new to add one.</i>				

# Requester Favorites- Adding New Organization (6 of 6)

- When logging in as a Regular User, the organization you added will appear in the requester drop-down box for your organization

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Requests](#) [Requester](#)

**Current Requester:**  
None

Requester Summary  
Requester Requests  
Requester Profile

[Requester Search](#)

### Requester Search

Choose one of the following options:

**A. Select a Third-Party Organization** (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of M. Mccarron, 123 Deer Ln., Arlington, VA 22345

**B. Search for a Person** (search for another person, or add a new one\*)

Name (Last) (First) An '\*' may be used as a wildcard.  
 ,

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records  
☒ Include Non-Patient Records

**C. Search for an Organization** (search for another organization, or add a new one\*)

Name (All or part of the name of the organization. An '\*' may be used as a wildcard.)

DMIS Code (the external identifier for the organization)



# Disabling Users (1 of 5)

---

- If a user transfers to another facility or separates from the Service, the User Admin needs to disable that individual's ability to access the tool
- You cannot delete users from the system
  - Future auditing
  - Disclosures tracking
  - Users are attached to records they created

# User Admin Functionality

## Disabling Users (2 of 5)

1. Select the **Admin Tab**
2. Select the **User Search** hyperlink

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users  
**User Search**  
[Add User](#)

### Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
<a href="#">1006</a>	10th MED GROUP-USAF ACADEMY CO	USAF A	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<a href="#">1109</a>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<a href="#">967</a>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<a href="#">1070</a>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
<a href="#">833</a>	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		

# User Admin Functionality

## Disabling Users (3 of 5)

3. Enter search criteria
4. Click on the **Search** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Search

**Name** (Last) (First)  
 ,

**System ID** (the identifier created by this system for the person)

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# User Admin Functionality

## Disabling Users (4 of 5)

5. Click on the radio button next to the user to be disabled
6. Click on the **Select** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Search

Search Results					
	ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	560	Miller, Erin			

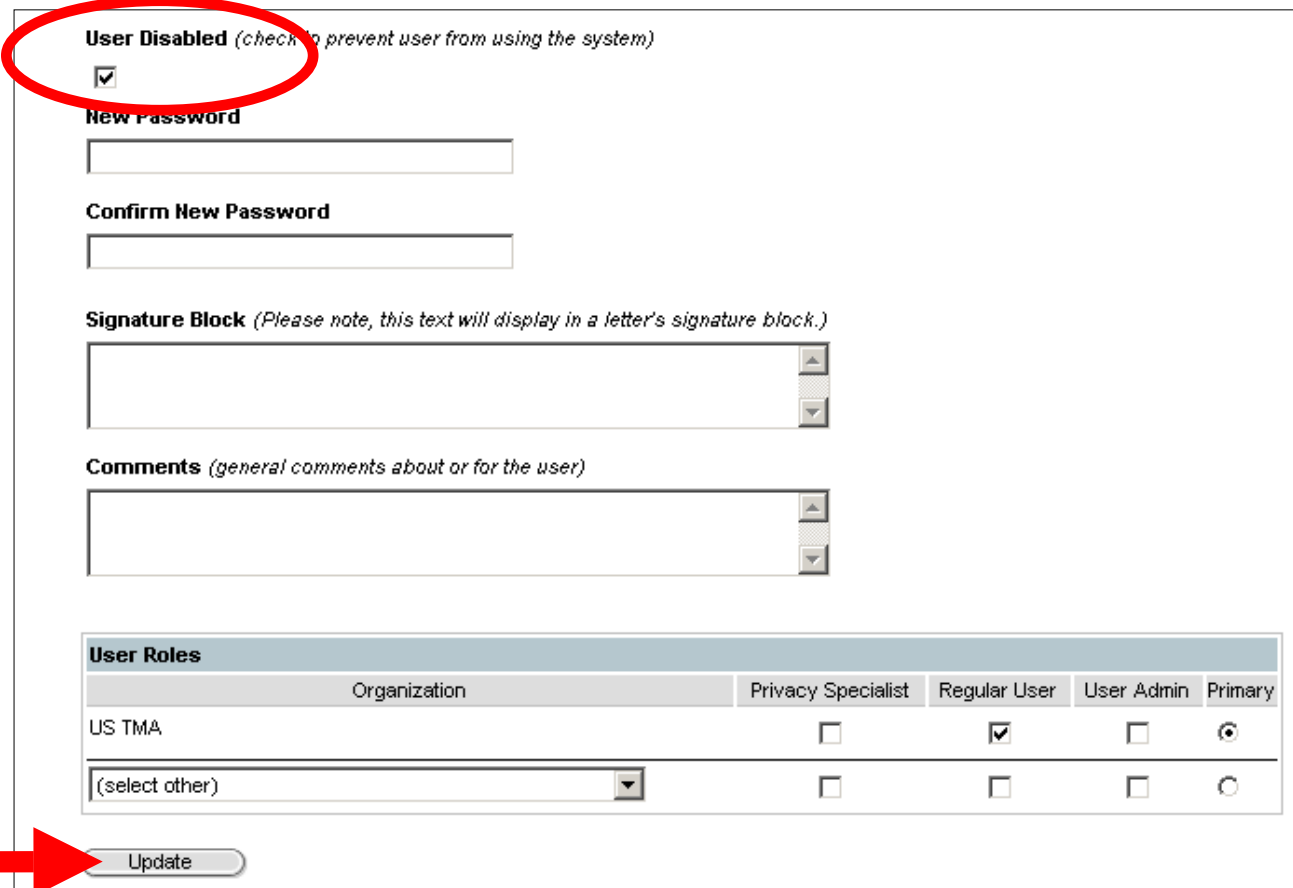
**Other options:**  
[Adjust your search criteria and try again.](#)

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## User Admin Functionality

# Disabling Users (5 of 5)

7. Scroll down and place a check in the “User Disabled” box
8. Click on the [Update](#) button



**User Disabled** *(check to prevent user from using the system)*

☒

**New Password**

**Confirm New Password**

**Signature Block** *(Please note, this text will display in a letter's signature block.)*

**Comments** *(general comments about or for the user)*

User Roles				
Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>
(select other)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>

**Update**

# Transferring Users (1 of 6)

---

- A transfer from one MTF to another can only be executed by the User Admin at the Service level
- If a user transfers to a new organization, the User Admin at the receiving location would initiate an action for the transfer according to Service requirements
- If a User transfers from one Service to another, please contact the HIPAA Support Center at
  - [Hipaasupport@tma.osd.mil](mailto:Hipaasupport@tma.osd.mil)
- The User Admin can only search for users within their level of the hierarchy


# User Admin Functionality

## Transferring Users (2 of 6)

1. Select the **Admin Tab**
2. Select the **User Search** hyperlink

Monday, January 24, 2005 [Logoff](#)

User

**Admin** 

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users  
**User Search**  
Add User

### Organizations

Origin Organizations					
ID	Name	Parent Name	Address	Contact Person	Contact Phone
<a href="#">1006</a>	10th MED GROUP-USAF ACADEMY CO	USAF	4102 Pinion Drive Ste 4000 USAF Academy, CO 80840		
<a href="#">1109</a>	10th Med GROUP- PETERSON AFB	HQ AIR FORCE SPACE COMMAND			
<a href="#">967</a>	11TH MED GRP-BOLLING	HQ Air Force (Direct reporting unit)	238 Brookley Avenue RM 125 Bolling AFB, DC 20032		
<a href="#">1070</a>	11th Wing	US Air Force	11 MDG/SGHQ 238 238 Brookley Ave Bolling AFB, DC 20032		
<a href="#">833</a>	121ST GEN HOSP SEOUL	18th MEDCOM - KOREA	Unit # 15244 APO AP , 96205		

# User Admin Functionality

## Transferring Users (3 of 6)

3. Enter the search criteria
4. Click on the **Search** button

Monday, January 24, 2005 Logoff

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Search

**Name**      (Last)                      (First)

**System ID** *(the identifier created by this system for the person)*

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# User Admin Functionality

## Transferring Users (4 of 6)

5. Click on the radio button for the user to be transferred
6. Click on the **Select** button

Monday, January 24, 2005 [Logoff](#)

User Admin

**Current Admin:**  
Scovel, Natalie  
US TMA

Organizations  
Application Users  
Queue Users

[User Search](#)  
[Add User](#)

### User Search

Search Results					
	ID	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	604	Wilson, James			

[Select](#)

**Other options:**  
[Adjust your search criteria and try again.](#)

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## User Admin Functionality

# Transferring Users (5 of 6)

7. Scroll down to the User Roles section
8. Select a new organization from the drop-down box and make any changes to the user role
9. Select primary radio button for the new organization
10. Click on the **Update** button

**Comments** *(general comments about or for the user)*

**User Roles**

Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
TRIPLER AMC-FT SHAFTER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>

**Update**

**Allowed Worklist Viewers** **New**

Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

## User Admin Functionality

# Transferring Users (6 of 6)


11. Remove the check for the old organization and role

12. Click on [Update](#)

**Comments** *(general comments about or for the user)*

**User Roles**

Organization	Privacy Specialist	Regular User	User Admin	Primary
US TMA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/>
TRIPLER AMC-FT SHAFTER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="radio"/>



**Allowed Worklist Viewers**

Name	Start Date	End Date
There are no Allowed Worklist Viewers configured. Click new to add one.		

# User Admin Functionality

## Summary

---

- You should now be able to:
  - Describe the process of obtaining a User Admin account
  - Create user accounts
  - Setup a workflow
  - Setup a queue
  - Create requester favorites
  - Disable users
  - Transfer users

# **Privacy Specialist/Regular User Functionality**

# Privacy Specialist/Regular User Functionality

## Objectives

---

- Upon completion of this lesson, you will be able to perform the tool functions related to:
  - Patient Records
  - Disclosures
  - Accounting of Disclosures
  - Suspending Disclosures
  - Restrictions
  - Authorizations

# Patient Records

# Objectives

---

- Upon completion of this lesson, you will be able to:
  - Search for a patient record
  - Add a patient record
  - Create an alternative address
  - Create an alternative telephone number



# Search for a Patient Record (1 of 4)

---

- The user must search for a patient record in order to:
  - Track a disclosure
  - Identify an authorization or restriction
  - Track a complaint
- The user can search for a patient record using the Family Member Prefix Sponsor's SSN (FMP-SSSN) or the patient's name
  - Partial searches are allowed
    - If you don't know the FMP
    - If you only know part of the Sponsor's SSN

# Search for a Patient Record (2 of 4)

### 1. Select the Patient Tab

The screenshot shows a web application interface for searching patient records. At the top, there is a header bar with the date "Tuesday, January 25, 2005" on the left and "Patient Search" and "Logoff" links on the right. Below the header is a tabbed interface with four tabs: "Patient", "User", "Requests", and "Requester". A red arrow points to the "Patient" tab, indicating it should be selected. On the left side of the interface, there is a sidebar with a "Current Patient: None" status and a "Patient Profile" section containing a link for "Patient Search". The main content area is titled "Patient Search" and contains three search methods: 1. "FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))" with four input fields separated by dashes. 2. "by Name" with sub-labels "(Last)" and "(First)" and two input fields. 3. "by System ID (the identifier created by this system for the person)" with a single input field. A "Search" button is located at the bottom of the search area. A red arrow points to the FMP-SSSN input fields. A grey callout box on the right contains the text: "Enhanced Search Features- Users can now search by the Patient's FMP-SSSN".

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

**Enhanced Search Features-** Users can now search by the Patient's FMP-SSSN

# Search for a Patient Record (3 of 4)

2. Type in the Search criteria (FMP-SSSN)
3. Click on the **Search** button

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

**Current Patient:**  
None

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

20 - 121 - 13 - 1414

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

# Search for a Patient Record (4 of 4)

### 4. Search Results will display

Tuesday, January 25, 2005 [Patient Search](#) [Logout](#)

[Patient](#) [User](#) [Requests](#) [Requester](#)

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-121131414

**Patient Search Results**

Search Results for **FMP-SSSN = [ \*20-121131414 ] (sorted by birth date)**

ID	FMP	Name	SSN	Birth Date	Address
291	20	Smith, Joe J	121131414	1968-07-05	188 Midland Pkwy Charleston, SC 29404

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

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# Partial Search (No FMP) (1 of 4)

1. Type in an asterisk in the FMP text box followed by the Sponsor's SSN
2. Click on the Search button

Friday, January 14, 2005 Patient Search Logoff

**Patient** **User** **Requests** **Requester**

**Current Patient:**  
None

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

\* - 211 - 12 - 5994


- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

 **Search**

# Partial Search (No FMP) (2 of 4)

- The patient will appear followed by dependents sorted by Date of Birth (DOB) if present

Friday, January 14, 2005 Patient Search Logoff

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

Patient Search

### Patient Search Results

**Search Results for FMP-SSSN = [ \*\*-211125994 ] (sorted by birth date)**

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	488	30	<b>Jordan, Michael J</b>	211125994	1970-03-05	1411 Jefferson Davis Falls Church, VA 21589
<i>FMP-SSSN 30-211125994 (2004-11-08 to 2004-11-08)</i>						
<input type="radio"/>	489	21	<b>Jordan, Jaunita</b>	549856985	1976-02-15	Primary address not selected
<i>FMP-SSSN 21-211125994 (2004-11-08 to 2004-11-08)</i>						
<input type="radio"/>	491	02	<b>Jordan, James</b>	986549879	1990-02-16	Primary address not selected
<i>FMP-SSSN 02-211125994 (2004-11-08 to 2004-11-08)</i>						
<input type="radio"/>	490	01	<b>Jordan, Jeffrey</b>	426369265		Primary address not selected
<i>FMP-SSSN 01-211125994 (2004-11-08 to 2004-11-08)</i>						

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

# Partial Search (Last 4 digits) (3 of 4)

1. Type in an asterisk in the first three FMP-SSSN text fields followed by the last four digits of the Sponsor's SSN
2. Click on the Search button

The screenshot shows a web application interface for patient records. At the top, there is a header bar with the date "Friday, January 14, 2005" on the left and "Patient Search" and "Logoff" links on the right. Below the header, there are four tabs: "Patient", "User", "Requests", and "Requester". The "Patient" tab is selected. On the left side, there is a sidebar with "Current Patient: None" and a "Patient Profile" section containing a "Patient Search" link. The main content area is titled "Patient Search". It features a red-bordered box containing the "FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))" label and four input fields. The first three fields contain an asterisk (\*), and the fourth field contains "5994". Below this box, there is a "- OR -" separator, followed by a search option "by Name" with sub-labels "(Last)" and "(First)" and two corresponding input fields. Another "- OR -" separator follows, then a search option "by System ID (the identifier created by this system for the person)" with a single input field. At the bottom, a red arrow points to a "Search" button.

Friday, January 14, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

\* - \* - \* - 5994

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

Search

# Partial Search (Last 4 digits) ( 4 of 4)

- The patients results screen will display all patients who have the last four digits of the SSN that was searched

Friday, January 14, 2005

Patient SearchLogoff

PatientUserRequestsRequester

Current Patient:  
None

Patient Search Results

Patient Profile

Patient Search

Search Results for FMP-SSSN = [ \*\*.5994 ] (sorted by birth date )

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	515	30	Trump, Donald	111115994	1960-02-05	Primary address not selected
FMP-SSSN 30-111115994 (2004-12-13 to 2004-12-13)						
<input type="radio"/>	488	30	Jordan, Michael J	211125994	1970-03-05	1411 Jefferson Davis Falls Church, VA 21589
FMP-SSSN 30-211125994 (2004-11-08 to 2004-11-08)						
<input type="radio"/>	489	21	Jordan, Jaunita	549856985	1976-02-15	Primary address not selected
FMP-SSSN 21-211125994 (2004-11-08 to 2004-11-08)						
<input type="radio"/>	491	02	Jordan, James	986549879	1990-02-16	Primary address not selected
FMP-SSSN 02-211125994 (2004-11-08 to 2004-11-08)						
<input type="radio"/>	490	01	Jordan, Jeffrey	426369265		Primary address not selected
FMP-SSSN 01-211125994 (2004-11-08 to 2004-11-08)						

Select

Other options:

[Adjust your search criteria and try again.](#)

[Create a new Patient record.](#)



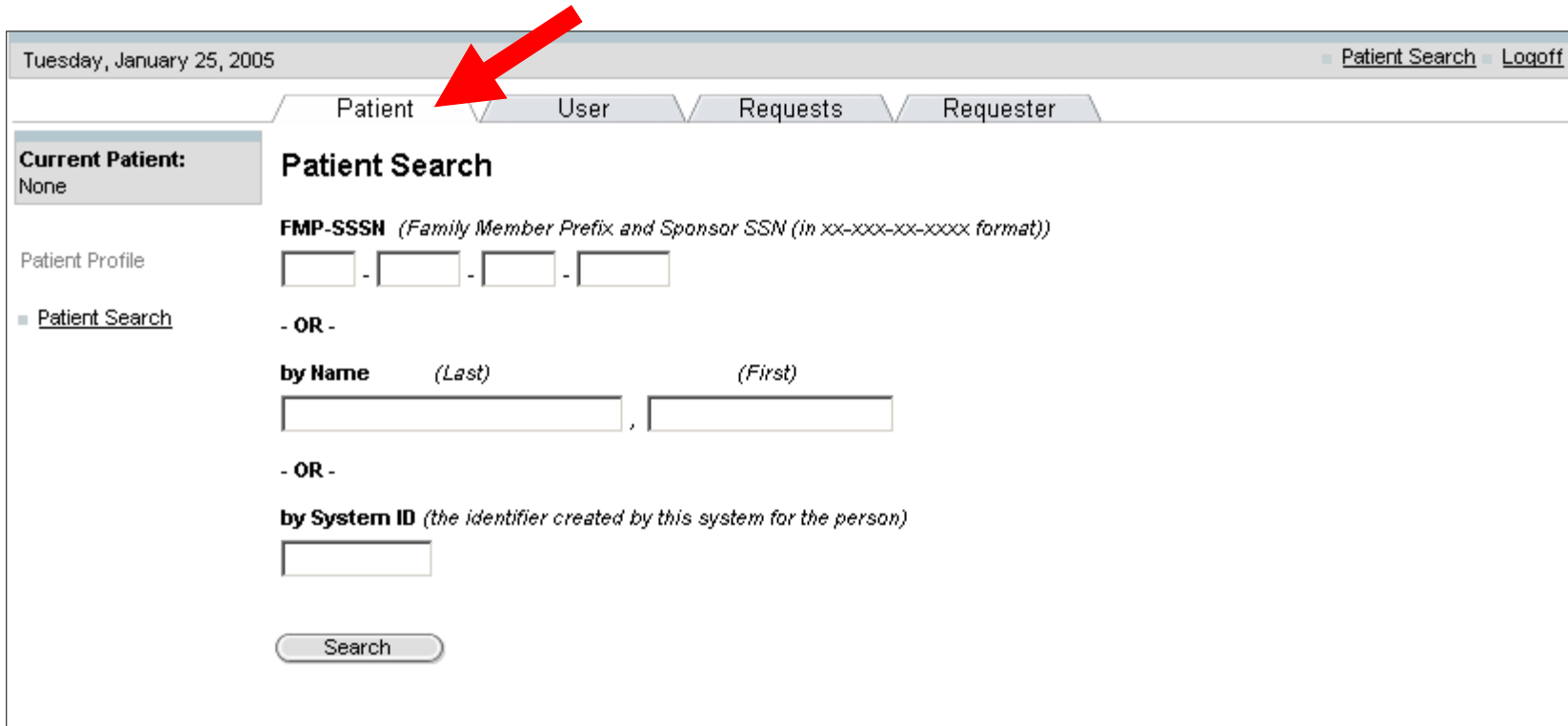
# Add a Patient Record (1 of 6)

---

- If a patient record does not exist in the PHIMT database, then the user must add a patient record
- New patient records cannot be created without first searching the database

# Add a Patient Record (2 of 6)

### 1. Select the Patient Tab



The screenshot shows a web application interface for patient records. At the top, there is a header bar with the date "Tuesday, January 25, 2005" on the left and links for "Patient Search" and "Logoff" on the right. Below the header is a navigation bar with four tabs: "Patient", "User", "Requests", and "Requester". A red arrow points to the "Patient" tab. On the left side of the main content area, there is a sidebar with a "Current Patient: None" status and a "Patient Profile" section containing a link for "Patient Search". The main content area is titled "Patient Search" and contains three search methods: 1. "FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))" with four input fields separated by hyphens. 2. "- OR -" followed by "by Name" with sub-labels "(Last)" and "(First)" and two input fields. 3. "- OR -" followed by "by System ID (the identifier created by this system for the person)" with a single input field. At the bottom of the search section is a "Search" button.

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

**Patient** User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

## Patient Records

# Add a Patient Record (3 of 6)

2. Type in the search criteria (patient's name)
3. Click on the **Search** button

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

### Patient Search

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

**New Naming convention implemented (Military format)**

**Last name, First name**

# Add a Patient Record (4 of 6)

4. If no results matched your search, select the [Create a New Patient Record](#) hyperlink

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

### Patient Search Results

**Search Results (sorted by birth date)**

ID	Name	SSN	Birth Date	Address
There were no results that matched your search criteria.				

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

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## Patient Records

# Add a Patient Record (5 of 6)

5. Enter Patient Information: (name, type, SSN, birth date, email, FMP-SSSN)
6. Click on the **Save** button

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

**Current Patient:**  
None

Patient Profile

[Patient Search](#)

**Person Details**

\* Name (Last) (First) (Middle) (Sr./Jr.)  
Kramer , Peter

\* Type  
Patient

SSN (in ###-##-#### format, enter '000-00-0000' if not known)  
234 - 12 - 5689

System ID (the identifier created by this system for the person)  
0

\* Birth Date (birth date in MM/DD/YYYY format)  
08 / 11 / 1970

Email (example: johnf@yahoo.com)  
kramerp@yahoo.com

FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))  
30 - 211 - 12 - 8767

Alternate Communication Instructions (special instructions to send correspondence to the person)

Comments (general comments about or for the person)

**Save**

## Patient Records

# Add a Patient Record (6 of 6)

7. Enter Address Details: USA or International format
8. Click on the **Save** button

**Current Patient:**  
None

**Address Details**

**Address Format** (APO and FPO address should use USA format)  
USA ☒ International ☐

**\* Address Line 1** (the primary address line)


**Address Line 2** (normally a suite or apartment)

**\* City** (city name, or APO or FPO)

**\* State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

**\* Postal Code** (USA: ##### - ####)  
 -

**Comments** (general comments about or for the address)

 **Save**

**Current Patient:**  
None

**Address Details**

**Address Format** (APO and FPO address should use USA format)  
USA ☐ International ☒


**Country** (country name)

**International Address Line 1**

**International Address Line 2**

**International Address Line 3**

**Comments** (general comments about or for the address)

 **Save**

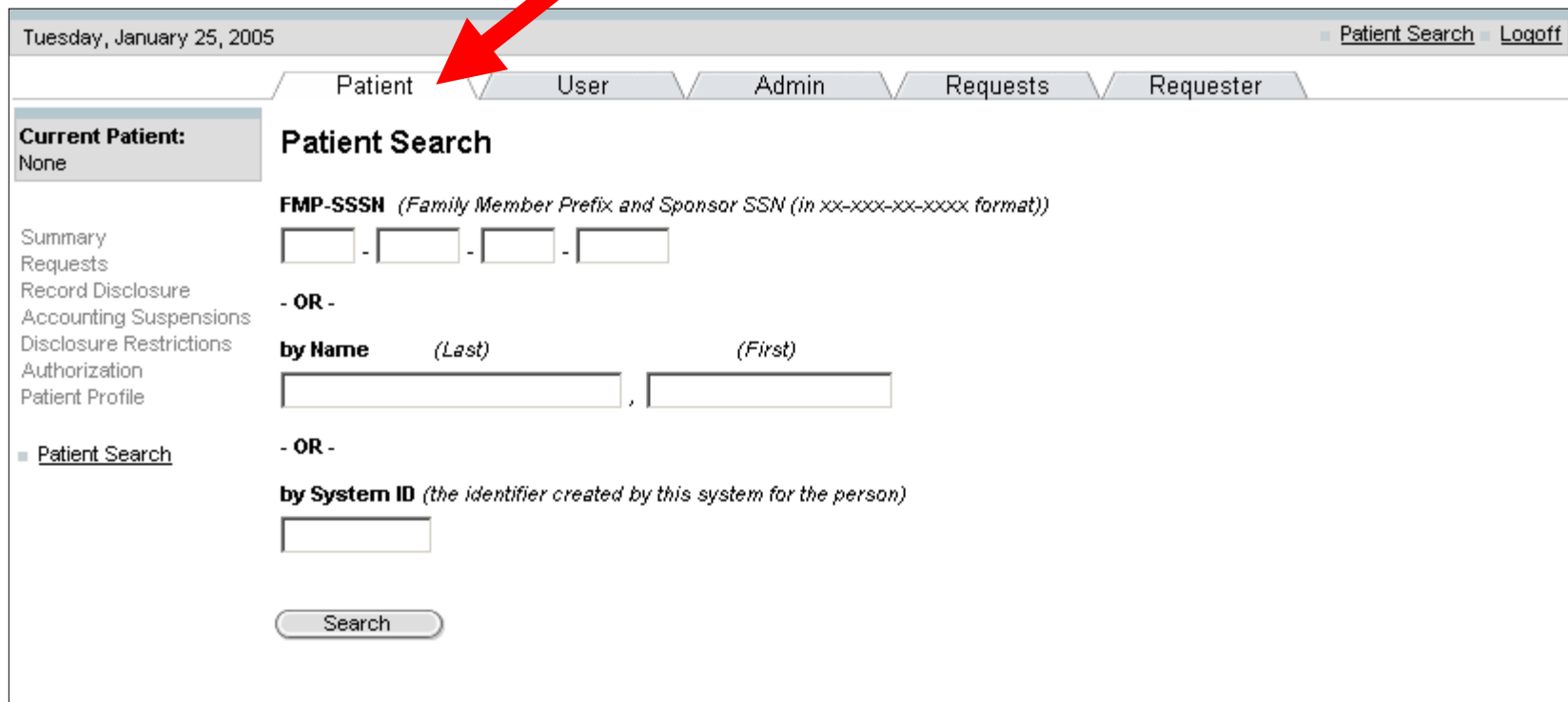
# Create an Alternative Address (1 of 12)

---

- A covered entity shall permit individuals to request and shall accommodate reasonable requests by individuals to receive communications of protected health information from the covered health care provider by alternative means or at alternative locations
  - DoD 6025.18-R C10.2.2
  - 164.522
- An alternative address can only be created by a Privacy Specialist

# Create an Alternative Address (2 of 12)

### 1. Select the Patient Tab



The screenshot shows a web application interface for patient records. At the top, there is a header bar with the date "Tuesday, January 25, 2005" on the left and "Patient Search" and "Logoff" links on the right. Below the header is a navigation bar with five tabs: "Patient", "User", "Admin", "Requests", and "Requester". A red arrow points to the "Patient" tab, which is currently selected. To the left of the main content area is a sidebar with a "Current Patient: None" status and a list of links: "Summary", "Requests", "Record Disclosure", "Accounting Suspensions", "Disclosure Restrictions", "Authorization", and "Patient Profile". The main content area is titled "Patient Search" and contains three search methods: 1. "FMP-SSSN (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))" with four input fields separated by dashes. 2. "- OR -" followed by "by Name" with sub-labels "(Last)" and "(First)" and two input fields. 3. "- OR -" followed by "by System ID (the identifier created by this system for the person)" with a single input field. A "Search" button is located at the bottom of the search area.

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

**Patient** User Admin Requests Requester

**Current Patient:**  
None

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)



# Create an Alternative Address (3 of 12)

2. Enter the patient search criteria
3. Click on the **Search** button

Tuesday, January 25, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Patient:** None

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -


- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)



# Create an Alternative Address (4 of 12)

4. Search Results will display
5. Select the patient

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Patient:**  
None

**Patient Search Results**

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

**Search Results for FMP-SSSN = [ \*20-121131414 ] (sorted by birth date)**

	ID	FMP	Name	SSN	Birth Date	Address
⊕	292	20	Smith, Joe J	121131414	1968-07-05	188 Midland Pkwy Charleston, SC 29404
FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)						

[Select](#)

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

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Version: 2.24

# Create an Alternative Address (5 of 12)

### 6. Select the Patient Profile hyperlink

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

### Summary

An alternate address exists for this patient.

#### Summary Item Filters

Display

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

- Summary
- Requests
- Record Disclosure
- Accounting Suspensions
- Disclosure Restrictions
- Authorization
- Patient Profile**
- [Patient Search](#)

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Version: 2.24

# Create an Alternative Address (6 of 12)

7. Scroll down to the Associated Addresses box and click on the **Alternative Communication** button

**Alternate Communication Instructions** *(special instructions to send correspondence to the person)*

Send all info to alternate address

**Comments** *(general comments about or for the person)*

Update

**Associated Addresses** New Alternate Communication

ID	Street	City	State	Zip	Alternate	Primary
1193	188 Midland Pkwy	Charleston	SC	29404	Yes	<input checked="" type="radio"/>

**Phone Numbers** New

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

# Create an Alternative Address (7 of 12)

8. Enter the Address Details: USA or International format
9. Put a check in the Alternate box

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Patient Profile \ Address Details

**Address Format** (APO and FPO address should use USA format)  
USA ☒ International ☐

\* **Address Line 1** (the primary address line)

**Address Line 2** (normally a suite or apartment)

\* **City** (city name, or APO or FPO)

\* **State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

\* **Postal Code** (USA: ##### - ####)  
 -

**Comments** (general comments about or for the address)

**Alternate** (is this an alternate address? All communications will be sent to this address if checked.)  
☒

# Create an Alternative Address (8 of 12)

10. Select **Approved** or **Denied** from the Outcome drop-down box

Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

■ Patient Search

**Address Line 2** (normally a suite or apartment)

\* **City** (city name, or APO or FPO)


\* **State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

\* **Postal Code** (USA: ##### - ####)  
 -

**Comments** (general comments about or for the address)

**Alternate** (Is this an alternate address? All communications will be sent to this address if checked.)  
☒

**Outcome** (indicate whether request for alternate address is approved or denied)  
  
Approved  
Denied



# Create an Alternative Address (9 of 12)

11. Once the outcome is selected, click on the **Save** button

Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

☐ Patient Search

**Address Line 2** (normally a suite or apartment)

\* **City** (city name, or APO or FPO)

\* **State** (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

\* **Postal Code** (USA: ##### - ####)  
 -

**Comments** (general comments about or for the address)

**Alternate** (Is this an alternate address? All communications will be sent to this address if checked.)  
☒

**Outcome** (indicate whether request for alternate address is approved or denied)

# Create an Alternative Address (10 of 12)

12. Enter an appropriate comment in the Alternate Communication Instructions text box
13. Click on the **Update** button

**Email** (example: johnf@yahoo.com)

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

 -  -  -

**Alternate Communication Instructions** (special instructions to send correspondence to the person)

Joe Smith would like all of his correspondence sent to an alternate address.

**Comments** (general comments about or for the person)

**Update**

Associated Addresses		New	Alternate Communication			
ID	Street	City	State	Zip	Alternate	Primary
<a href="#">1373</a>	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
<a href="#">1193</a>	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>



# Create an Alternative Address (11 of 12)

14. Scroll to the bottom of the Patient Profile screen to view the added alternative address

**Email** (example: johnf@yahoo.com)

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))  
 20 -  121 -  13 -  1414

**Alternate Communication Instructions** (special instructions to send correspondence to the person)

**Comments** (general comments about or for the person)

**Associated Addresses**

ID	Street	City	State	Zip	Alternate	Primary
<a href="#">1373</a>	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
<a href="#">1193</a>	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>

**Phone Numbers**

ID	Phone	Comment	Active	Primary
There are currently no phone numbers on record for this person. Click new to add one.				

# Create an Alternative Address (12 of 12)

- After an alternative address has been recorded, a note will appear on the Patient Summary Screen

The screenshot displays the 'Patient Summary' screen in a web application. At the top, there is a header bar with the date 'Tuesday, January 25, 2005' and links for 'Patient Search' and 'Logoff'. Below the header, a navigation menu includes tabs for 'Patient', 'User', 'Admin', 'Requests', and 'Requester'. On the left side, a sidebar lists the 'Current Patient' information: 'Smith, Joe J', '05/1968', 'MP-SSSN:20-', and '1131414'. The main content area is titled 'Summary' and contains a message: 'An alternate address exists for this patient.', which is circled in red. Below this message is a 'Summary Item Filters' section with a 'Display' button and several checkboxes: 'All', 'Disclosures', 'Suspensions', 'Restrictions', 'Reports', 'Letters', 'Authorizations', and 'Complaints'. At the bottom of the screen, there is a copyright notice: 'Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED' and 'Version: 2.24'. A 'Patient Search' link is also visible in the bottom left corner.

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
05/1968  
MP-SSSN:20-  
1131414

**Summary**

An alternate address exists for this patient.

**Summary Item Filters**

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

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Version: 2.24

# Create an Alternative Telephone Number (1 of 4)

---

- Individuals have the right to request an alternative telephone number for receiving communications related to their PHI
- An alternative telephone number can be created by Regular Users and Privacy Specialists

# Create an Alternative Telephone Number (2 of 4)

1. Scroll to the bottom of the Patient Details screen
2. Click on the **New** button next to Phone Numbers

**Comments** *(general comments about or for the person)*

Associated Addresses		Alternate Communication				
ID	Street	City	State	Zip	Alternate	Primary
<a href="#">1373</a>	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
<a href="#">1193</a>	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>

Phone Numbers		New		
ID	Phone	Comment	Active	Primary
<i>There are currently no phone numbers on record for this person. Click new to add one.</i>				

# Create an Alternative Telephone Number (3 of 4)

3. The Phone Number Details screen will display (choose USA or International format)
4. Type in the phone number and enter any comments
5. Click on the **Save** button

Tuesday, January 25, 2005

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Phone Number Details**

**Phone Format**  
USA ☐ International ☒

**Phone Number** (area code, phone number, and extension if applicable)  
(803) 435 - 6789 ext.

**Comments** (general comments about or for the phone)

**Active** (Is this an active phone? Inactive phones are going to be removed from display and archived.)  
☒

**Save**

Tuesday, January 25, 2005

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Phone Number Details**

**Phone Format**  
USA ☐ International ☒

**Phone Number** (enter country-code, area code and phone number together, followed by the extension)  
 ext.

**Comments** (general comments about or for the phone)

**Active** (Is this an active phone? Inactive phones are going to be removed from display and archived.)  
☒

**Save**

# Create an Alternative Telephone Number (4 of 4)

6. The phone number you added will appear on the Patient Details screen

**Alternate Communication Instructions** *(special instructions to send correspondence to the person)*

Send all info to alternate address

**Comments** *(general comments about or for the person)*

Update

**Associated Addresses**

ID	Street	City	State	Zip	Alternate	Primary
<u>1373</u>	23 King St.	Charleston	SC	84536	Yes	<input checked="" type="radio"/>
<u>1193</u>	188 Midland Pkwy	Charleston	SC	29404	Yes	<input type="radio"/>

**Phone Numbers**

ID	Phone	Comment	Active	Primary
<u>483</u>	(803) 435-6789	This is a cell phone number with voice mail.	Yes	<input checked="" type="radio"/>

## Patient Records

# Summary

---

- You should now be able to:
  - Search for a patient record
  - Add a patient record
  - Create an alternative address
  - Create an alternative telephone number

# Disclosures



# Objectives

---

- Upon completion of this lesson, you will be able to:
  - Record a request for disclosure as a Regular User
    - Regular Users can now update the Patient's address in the middle of a disclosure request
  - Record a disclosure as a Privacy Specialist
  - Approve/deny a disclosure
  - Amend a disclosure

# Recording a Request for Disclosure (1 of 12)

---

- Individuals have the right to an accounting of disclosures
- DoD 6025.18-R requires us to record specific information
- Chapter 13 pertains to the Accounting of Disclosures Policy
- Regular Users record requests for disclosures and route them to their Privacy Specialist for approval or denial

## Disclosures

# Recording a Request for Disclosure (2 of 12)

1. Select the **Requests Tab**
2. Click on the **Disclosure** Radio Button
3. Click on the **Next** button

The screenshot shows a web application interface for recording a request. At the top, there is a header bar with the date 'Tuesday, January 25, 2005' on the left and links for 'Patient Search' and 'Logoff' on the right. Below the header is a navigation bar with four tabs: 'Patient', 'User', 'Requests', and 'Requester'. A red arrow points to the 'Requests' tab. On the left side of the main content area, there is a sidebar with a 'Current Request:' section showing 'None' and two links: 'Create New Request' and 'Search for a Request'. The main content area is titled 'Create New Request' and contains a section 'Select Request Type' with two radio buttons: 'Disclosure' (which is selected and circled in red) and 'Disclosure Accounting'. A red arrow points to the 'Next' button at the bottom of the form.

## Disclosures

# Recording a Request for Disclosure (3 of 12)

4. Enter patient search criteria
5. Click on the **Search** button

Tuesday, January 25, 2005 Patient Search Logoff

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

**Select Patient** **Select Requester** **Request Details** **Disclosure Details** **Request Action**

① ② ③ ④ ⑤

☐ Create New Request  
☐ Search for a Request

### Patient Search

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -


- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)



## Disclosures

# Recording a Request for Disclosure (4 of 12)

6. Select the radio button next to the patient's name
7. Click on the **Select** button

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

**Select Patient** **Select Requester** **Request Details** **Disclosure Details** **Request Action**

① ② ③ ④ ⑤


☐ Create New Request  
☐ Search for a Request

### Patient Search Results

Search Results for FMP-SSSN = [ \*30-211128767 ] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/> 61	30	Kramer, Peter	234125689	1970-08-11	211 River Rd. Alexandria, VA 22454

FMP-SSSN 30-211128767 (2005-01-25 to 2005-01-25)

 **Select**

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

# Recording a Request for Disclosure (5 of 12)

- If the request is being made by the patient themselves,
8. Click on the **Select** button next to the patient's name

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

[Select Patient](#) [Select Requester](#) [Request Details](#) [Disclosure Details](#) [Request Action](#)

① ② ③ ④ ⑤

[Create New Request](#)  
[Search for a Request](#)

### Requester Search

Choose one of the following options:

**A. Select the Patient** (the request is being made by the Patient themselves)

[Select](#)

**B. Select a Third-Party Organization** (a third-party requester, such as a law enforcement agency or insurance company)

[Select](#)

**C. Search for a Person** (search for another person, or add a new one\*)

Name (Last) (First) An '\*' may be used as a wildcard.

,

System ID (the identification number created by this system for the person)

FMP-SSN (an external identifier for the person)

☒ Include Patient Records  
☒ Include Non-Patient Records

[Search](#)

**D. Search for an Organization** (search for another organization, or add a new one\*)

## Disclosures

# Recording a Request for Disclosure (6 of 12)

9. Confirm Requester and Recipient Details

10. Click on the **Next** button

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

[Select Patient](#) [Select Requester](#) [Request Details](#) [Disclosure Details](#) [Request Action](#)

① ② ③ ④ ⑤

[Create New Request](#)  
[Search for a Request](#)


### Confirm Requester and Recipient Details

**Patient:** Peter Kramer  
**Date of Birth:** 1970-08-11  
**SSN:** 234125689  
**Address:** 211 River Rd., Alexandria, VA 22454

**Requester:** Peter Kramer [change](#)  
**Address:** 211 River Rd., Alexandria, VA 22454 [Add New](#)

**Recipient:** [Same as requester](#)  
[set a different recipient](#)

[Back](#) [Next](#)



# Recording a Request for Disclosure (7 of 12)

## 11. Enter in the Request Details: (details of the request, identity verification, and authority verification)

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester **Request Details** Disclosure Details Request Action

1 2 3 4 5

Create New Request  
Search for a Request

### Request Details

**Details of the Request** (requester's comments, or instructions about this request)

**\* Requester Identity Verified** (was the requester's identity verified?)

Patient Identifier

**Description of Requester Identity Verification** (if the requester's identity was verified, how was it verified?)

license

**\* Requester Authority Verified** (was the requester's authority to access information verified?)

Patient is Requester

**Description of Requester Authority Verification** (if the requester's authority was verified, how was it verified?)

Patient is requester

**Information Start Date** (the start date for the information in MM/DD/YYYY format)



## Disclosures

# Recording a Request for Disclosure (8 of 12)

12. Scroll down the screen and enter: (Information start and end date, request format, and request classification)
13. Click on the **Next** button

**\* Requester Identity Verified** (was the requester's identity verified?)  
Patient Identifier

**Description of Requester Identity Verification** (if the requester's identity was verified, how was it verified?)  
license

**\* Requester Authority Verified** (was the requester's authority to access information verified?)  
Patient is Requester

**Description of Requester Authority Verification** (if the requester's authority was verified, how was it verified?)  
Patient is requester

**Information Start Date** (the start date for the information in MM/DD/YYYY format)  
01/25/2005

**Information End Date** (the end date for the information in MM/DD/YYYY format)  
02/25/2005

**Request Format** (the format in which this request has been received)  
Received Request in Writing

**Request Classification** (an optional classification for this request)  
Medical

Back Next

## Disclosures

# Recording a Request for Disclosure (9 of 12)

14. Enter in the Disclosure Details: (Disclosure type, status, disclosure date, treatment start and end date, origin organization, disclosure purpose)

Tuesday, January 25, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Request: Disclosure

Select Patient Select Requester Request Details **Disclosure Details** Request Action

① ② ③ ④ ⑤

- Create New Request
- Search for a Request

### Disclosure Details

**Disclosure Type** (the type of disclosure)  
Law Enforcement Purposes

**Disclosure Status** (the status of the disclosure)  
Pending

**Disclosure Date** (the disclosure date in MM/DD/YYYY format)  
01/25/2005

**Treatment Start Date** (the service start date in MM/DD/YYYY format)  
12/07/2004

**Treatment End Date** (the service end date in MM/DD/YYYY format)  
01/15/2005

**Origin Organization** (where the disclosure originated)  
US TMA

**Disclosure Purpose** (the purpose of the disclosure)  
Law Enforcement

## Disclosures

# Recording a Request for Disclosure (10 of 12)

15. Scroll down the screen and enter: (PHI description and disclosure comments)
16. Click on the **Next** button

**Disclosure Purpose** *(the purpose of the disclosure)*

Law Enforcement

Other:

**Protected Health Information Description** *(the description of the Protected Health Information disclosed)*

☒ Complete Health Record(s)

☐ Consultation Report(s)

☐ Discharge Summary

☐ History and Physical Examination

☐ Laboratory Test(s)

☐ Operative Report(s)

☐ Pathology Report(s)

☐ Progress Notes

Other:

**Disclosure Comments** *(the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)*

Back Next

## Disclosures

# Recording a Request for Disclosure (11 of 12)

17. Enter in the Request Action Details
18. From the Action drop-down box, select the appropriate routing option (Privacy Specialist)
19. Click on the **Save** button

**Current Request:**  
Disclosure

■ Create New Request  
■ Search for a Request

**Request Action**

**Patient**  
**Name:** Peter Kramer  
**SSN #:** 234125689  
**Birth Date:** 08-11-1970  
**Address:** 211 River Rd., Alexandria, VA 22454

**Requester/Recipient**  
**Name:** Peter Kramer  
**Address:** 211 River Rd., Alexandria, VA 22454

**Details of the Request** (requester's comments about the scope of this request)

**Approved Part** (for partially approved requests, describe part of request that was approved)

**Denied Part** (for partially denied requests, describe part of request that was denied)

**Action** (action for this request)  
Route to Privacy Specialist

Back Save

# Recording a Request for Disclosure (12 of 12)

## 20. The Disclosure Request Summary will display

Tuesday, January 25, 2005

Patient SearchLogoff

PatientUserRequestsRequester

Current Request:  
Disclosure

Summary  
History  
Documents  
Request Details  
Disclosure Details  
Request Action

Create New Request

Search for a Request

Request Summary

Patient

**Name:** Peter Kramer  
**SSN #** 234125689  
**Birth Date:** 08-11-1970  
**Address:** 211 River Rd., Alexandria, VA 22454

**Requester/Recipient**  
**Name:** Peter Kramer  
**Address:** 211 River Rd., Alexandria, VA 22454

**Request Status:** Routed for Approval  
**Request Creation Date:** 01/25/2005 at 04:06:05 PM EST  
**Request Last Update Date:** 01/25/2005 at 04:06:06 PM EST

Other Request Details

Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 268, Date: 01/25/2005
Start Date	01/25/2005
End Date	02/25/2005
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester

# Update Patient Address (1 of 6)

---

- For a disclosure to be valid, a patient's address must be entered
- The Regular User can update the patient's address in the middle of the disclosure request

## Disclosures

# Update Patient Address (2 of 6)

1. Click on the **Request Tab**
2. Select the Disclosure radio button
3. Click on the **Next** button

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

Patient User **Requests** Requester

**Current Request:**  
None

**Create New Request**

**Select Request Type**

☒ Disclosure

☐ Disclosure Accounting

**Next**

## Disclosures

# Update Patient Address (3 of 6)

4. Type in the patient's FMP-SSSN
5. Click on the Search button

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

**Select Patient** **Select Requester** **Request Details** **Disclosure Details** **Request Action**

① ② ③ ④ ⑤

☐ Create New Request  
☐ Search for a Request

### Patient Search

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -


- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)





## Disclosures

# Update Patient Address (4 of 6)

- The primary address is not entered

### 6. Select the patient

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

[Select Patient](#) [Select Requester](#) [Request Details](#) [Disclosure Details](#) [Request Action](#)

① ② ③ ④ ⑤


[Create New Request](#)  
[Search for a Request](#)

### Patient Search Results

**Search Results for FMP-SSSN = [ \*01-211125994 ] (sorted by birth date )**

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	490	01	Jordan, Jeffrey	426369265		Primary address not selected

FMP-SSSN 01-211125994 (2004-11-08 to 2004-11-08)

 [Select](#)

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

## Disclosures

# Update Patient Address (5 of 6)

7. Type in the patient's address
8. Click on the Save button

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

Patient User Requests Requester

Current Request: Disclosure

Select Patient (1) Select Requester (2) Request Details (3) Disclosure Details (4) Request Action (5)

Create New Request  
Search for a Request

### Address Details

Error(s) have occurred:  
■ Patient's primary address is missing. You must enter an address to continue.

Address Format (APO and FPO address should use USA format)  
USA ☒ International ☐

\* Address Line 1 (the primary address line)


Address Line 2 (normally a suite or apartment)

\* City (city name, or APO or FPO)

\* State (two character state identifier: IL, MN, CO, etc., or AA, AE, AP for APO/FPO)

\* Postal Code (USA: ##### - ####)  
 -

Comments (general comments about or for the address)

 Save

## Disclosures

# Update Patient Address (6 of 6)

- After saving the address, you can continue with the Disclosure Request where you left off

Monday, January 24, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Requests** **Requester**

**Current Request:**  
Disclosure

[Select Patient](#) [Select Requester](#) [Request Details](#) [Disclosure Details](#) [Request Action](#)

① ② ③ ④ ⑤

[Create New Request](#)  
[Search for a Request](#)

### Requester Search

Choose one of the following options:

**A. Select the Patient** *(the request is being made by the Patient themselves)*

**B. Select a Third-Party Organization** *(a third-party requester, such as a law enforcement agency or insurance company)*

**C. Search for a Person** *(search for another person, or add a new one\*)*

**Name** (Last) (First) An "\*" may be used as a wildcard.

,

**System ID** *(the identification number created by this system for the person)*

**FMP-SSN** *(an external identifier for the person)*

☒ Include Patient Records  
☒ Include Non-Patient Records

# Approving/Denying a Disclosure (1 of 4)

---

- Once a Regular User routes a request for disclosure to the Privacy Specialist, the request will display in the Privacy Specialist's work list
- The Privacy Specialist will then approve or deny the request

## Disclosures

# Approving/Denying a Disclosure (2 of 4)

1. Select the **User** tab
2. Select **My Worklist** hyperlink
3. Select the **Edit** hyperlink for the disclosure that the Privacy Specialist will approve or deny

Tuesday, January 25, 2005 [Patient Search](#) [Logout](#)

**User Worklist**

**Current User:**  
Wilson, James  
US TMA

[My Profile](#)  
[My Requests](#)  
[My Worklist](#)

[Switch organizations](#)

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
<a href="#">edit</a>	369	291	Request Approval (Disclosure)	Kramer, Peter	Kramer, Peter	Action Pending	01/25/2005

**Naval Hospital Worklist**

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

[Accept](#)

## Disclosures

# Approving/Denying a Disclosure (3 of 4)

4. Select **Approved** or **Denied** from the Activity Status drop-down box
5. Click on the **Update** button

**Patient**  
**Name:** Peter Kramer  
**SSN #:** 234125689  
**Birth Date:** 08-11-1970  
**Address:** 211 River Rd., Alexandria, VA 22454

**Requester/Recipient**  
**Name:** Peter Kramer  
**Address:** 211 River Rd., Alexandria, VA 22454

**Instructions**  
Request Approval (Disclosure)

**Activity Status** (new activity status code)  
Approved  
Action Pending  
Approved  
Denied  
Cancelled  
Route to Privacy Specialist  
Route to Other User  
Denied Part (for partially approved requests, describe part of request that was denied)

**Route Completed Request to Originator** (route to the request creator for acknowledgement & document preparation)  
☐

**Comments** (enter details about this activity)

Update

## Disclosures

# Approving/Denying a Disclosure (4 of 4)

- The approved/denied request will display in the Request Activity History box

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Request:**  
Disclosure

**Edit Request**

**Request Activity History**

Activity Instance ID	Request Session ID	Activity ID	Source	Patient Id	Requester Id	User	Status	Creation Date
<a href="#">369</a>	291	Request Approval (Disclosure)		Kramer, Peter	Kramer, Peter	James Wilson	Approved	01/25/2005

**Request Session Details** [Edit](#)

Description	Details
Request Type	Disclosure
Details of the Request	
Disclosure Type	Type: Law Enforcement Purposes, ID: 268, Date: 01/25/2005
Start Date	01/25/2005
End Date	02/25/2005
PHI Items	Complete Health Record(s)
Authority Verified	Patient is Requester
Verify Authority Text	Patient is requester
Identity Verified	Patient Identifier
Verify Identity Text	license
Route to Privacy Specialist	Yes
Request Classification	Medical
Request Format	Received Request in Writing

[Summary](#)  
[History](#)  
[Documents](#)  
[Request Details](#)  
[Disclosure Details](#)  
[Request Action](#)

[Create New Request](#)  
[Search for a Request](#)

# Recording a Disclosure (1 of 10)

---

- Privacy Specialists have the ability to record and approve disclosures in one step
- This eliminates the two step process of recording the request, routing it to their work list, and then approving it



## Disclosures

# Recording a Disclosure (2 of 10)

1. Select the **Patient** tab
2. Enter patient search criteria
3. Click on the **Search** button

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Patient** User Admin Requests Requester

**Current Patient:** None

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

## Disclosures

# Recording a Disclosure (3 of 10)

4. Click on the radio button for the appropriate patient
5. Click on the **Select** button

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Patient:** None

**Patient Search Results**

Search Results for FMP-SSSN = [ \*20-121131414 ] (sorted by birth date)

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

■ Patient Search

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Version: 2.24

## Disclosures

# Recording a Disclosure (4 of 10)

### 6. Select the [Record Disclosure](#) hyperlink

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

[Summary](#)  
[Requests](#)  
[Record Disclosure](#)  
[Accounting Suspensions](#)  
[Disclosure Restrictions](#)  
[Authorization](#)  
[Patient Profile](#)

[Patient Search](#)

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Version: 2.24

## Disclosures

# Recording a Disclosure (5 of 10)

- Click on the **Change** button to change or update the requester

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Admin** **Requests** **Requester**

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)


### Record Disclosure

**Requester** *(the organization or person requesting the disclosure)* **Change**

Name:  
Address:  
Phone:  
Contact Person:

**Requester Authority** *(the authority of the requester)*  
Undefined

**Request Form** *(the form of the disclosure request)*  
Undefined

**Request Date** *(the disclosure request date in MM/DD/YYYY format)*  
 

# Recording a Disclosure (6 of 10)

## 8. Select the requester

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Requester Search

Choose one of the following options:

**A. Select the Patient** *(the request is being made by the Patient themselves)*

Smith, Joe J

**B. Select a Third-Party Organization** *(a third-party requester, such as a law enforcement agency or insurance company)*

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

**C. Search for a Person** *(search for another person, or add a new one\*)*

Name (Last) (First) An "\*" may be used as a wildcard.  
 ,

System ID *(the identification number created by this system for the person)*

FMP-SSN *(an external identifier for the person)*

☒ Include Patient Records  
☒ Include Non-Patient Records

**D. Search for an Organization** *(search for another organization, or add a new one\*)*

Name *(All or part of the name of the organization. An "\*" may be used as a wildcard.)*

DMIS Code *(the external identifier for the organization)*

## Disclosures

# Recording a Disclosure (7 of 10)

- Record the disclosure details: (requester authority, form, date, recipient, disclosure type)
- Select the Disclosure Status from the drop-down box

Thursday, January 27, 2005 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Record Disclosure

**Requester** (the organization or person requesting the disclosure) [Change](#)  
Name: Smith, Joe J  
Address: 23 King St., Charleston, SC 84536  
Phone: (803) 435-6789  
Contact Person:

**Requester Authority** (the authority of the requester)  
Patient is Requester

**Request Form** (the form of the disclosure request)  
Received Request in Writing

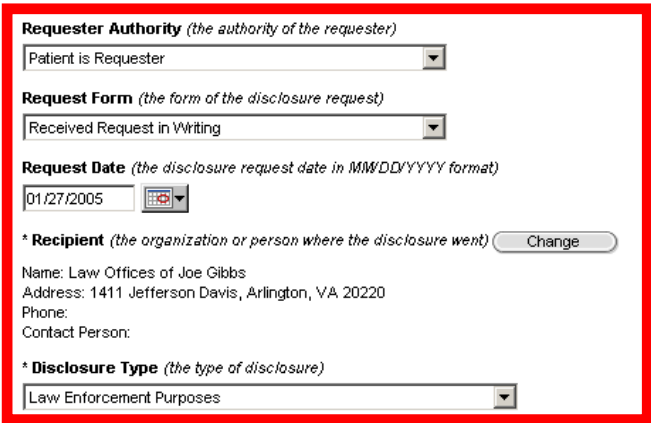
**Request Date** (the disclosure request date in MM/DD/YYYY format)  
01/27/2005

**\* Recipient** (the organization or person where the disclosure went) [Change](#)  
Name: Law Offices of Joe Gibbs  
Address: 1411 Jefferson Davis, Arlington, VA 20220  
Phone:  
Contact Person:

**\* Disclosure Type** (the type of disclosure)  
Law Enforcement Purposes

**Disclosure Status** (the status of the disclosure)  
Pending  
Cancelled  
Complete  
Pending  
Undefined

**Treatment Start Date** (the treatment or service start date in MM/DD/YYYY format)



## Disclosures

# Recording a Disclosure (8 of 10)

11. Scroll down the screen and enter: (disclosure date, origin organization, disclosure purpose, and PHI description)

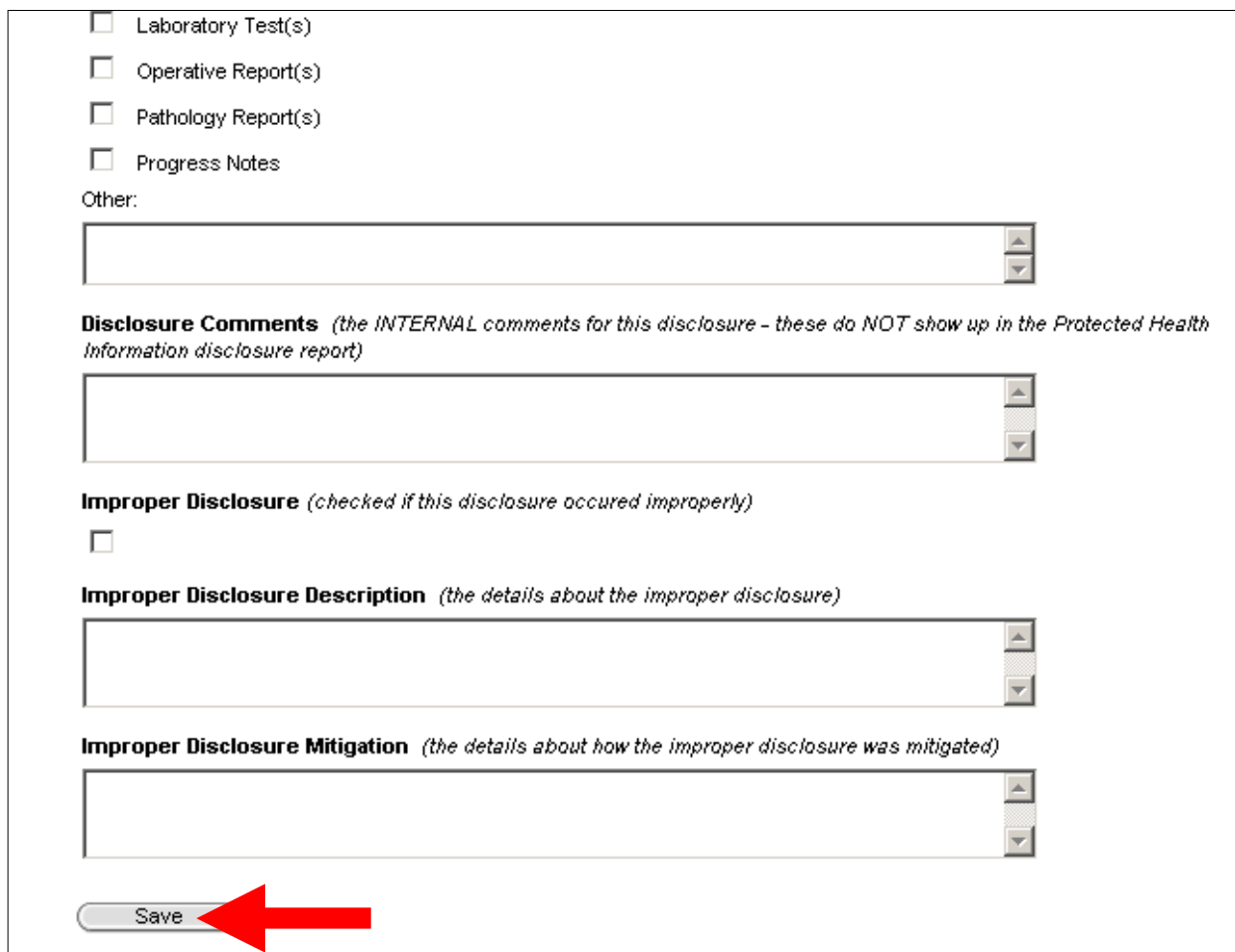
The screenshot shows a web form for recording a disclosure. Red arrows point to the following fields:

- Disclosure Date** (the disclosure date in MM/DD/YYYY format): 01/27/2005
- Treatment Start Date** (the treatment or service start date in MM/DD/YYYY format): 01/03/2005
- Treatment End Date** (the treatment or service end date in MM/DD/YYYY format): 01/06/2005
- Treatment Identifier** (the treatment or service identifier): (empty field)
- Origin Organization** (where the disclosure originated): US TMA
- Disclosure Purpose** (the purpose of the disclosure): Law Enforcement
- Protected Health Information Description** (the description of the Protected Health Information disclosed):
  - ☒ Complete Health Record(s)
  - ☐ Consultation Report(s)
  - ☐ Discharge Summary
  - ☐ History and Physical Examination
  - ☐ Laboratory Test(s)
  - ☐ Operative Report(s)
  - ☐ Pathology Report(s)
  - ☐ Progress Notes
  - Other: (empty field)

## Disclosures

# Recording a Disclosure (9 of 10)

12. Scroll down to the bottom of the screen and click on the **Save** button



☐ Laboratory Test(s)

☐ Operative Report(s)

☐ Pathology Report(s)

☐ Progress Notes

Other:


**Disclosure Comments** *(the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)*

**Improper Disclosure** *(checked if this disclosure occurred improperly)*

☐

**Improper Disclosure Description** *(the details about the improper disclosure)*

**Improper Disclosure Mitigation** *(the details about how the improper disclosure was mitigated)*

**Save** 



## Disclosures

# Recording a Disclosure (10 of 10)

- The disclosure is now complete and only the disclosure comments and improper fields can be updated

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Record Disclosure**

**This disclosure (ID #286) was created on 01/27/2005 at 11:09:57 AM EST, and last updated on 01/27/2005 at 11:09:57 AM EST.**

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

**Requester** *(the organization or person requesting the disclosure)*  
Name: Smith, Joe J  
Address: 23 King St., Charleston, SC 84536  
Phone: (803) 435-6789  
Contact Person:

**Requester Authority** *(the authority of the requester)*  
Patient is Requester

**Request Form** *(the form of the disclosure request)*  
Received Request in Writing

**Request Date** *(the disclosure request date in MM/DD/YYYY format)*  
01/27/2005

**\* Recipient** *(the organization or person where the disclosure went)*  
Name: Law Offices of Joe Gibbs  
Address: 1411 Jefferson Davis, Arlington, VA 20220  
Phone:  
Contact Person:

# Amending Disclosures (1 of 6)

---

- As a Privacy Specialist you are authorized to label a disclosure as Improper
- Once a Disclosure status is marked as completed, it can only be amended by marking it as an Improper Disclosure
  - The disclosure was made incorrectly

## Disclosures

# Amending Disclosures (2 of 6)

1. Select the **Patient** tab
2. Search for and select the patient

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Admin** **Requests** **Requester**

**Current Patient:**  
None

**Patient Search Results**

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

**Search Results for FMP-SSSN = [ \*20-121131414 ] (sorted by birth date )**

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	292	20	<b>Smith, Joe J</b>	121131414	1968-07-05	23 King St. Charleston, SC 84536

*FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)*

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

## Disclosures

# Amending Disclosures (3 of 6)

- Place a check in the Disclosures box and click on the **Display** button

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☒ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

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Version: 2.24

## Disclosures

# Amending Disclosures (4 of 6)

4. Select the **ID** hyperlink for the disclosure that you want to amend

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

[Summary](#)  
[Requests](#)  
[Record Disclosure](#)  
[Accounting Suspensions](#)  
[Disclosure Restrictions](#)  
[Authorization](#)  
[Patient Profile](#)  
  
[Patient Search](#)

PatientUserAdminRequestsRequester

### Summary

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☒ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

**Disclosures (Suspended disclosures are highlighted in red)**

ID	Date	Type	Origin	Received By	Protected Health Information	Purpose	Status
<a href="#">286</a>	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
<a href="#">137</a>	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
<a href="#">100</a>	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

# Amending Disclosures (5 of 6)

### 5. The Record Disclosure screen will display

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Record Disclosure**

This disclosure (ID #286) was created on 01/27/2005 at 11:09:57 AM EST, and last updated on 01/27/2005 at 11:09:57 AM EST.

**Requester** (the organization or person requesting the disclosure)  
Name: Smith, Joe J  
Address: 23 King St., Charleston, SC 84536  
Phone: (803) 435-6789  
Contact Person:

**Requester Authority** (the authority of the requester)  
Patient is Requester

**Request Form** (the form of the disclosure request)  
Received Request in Writing

**Request Date** (the disclosure request date in MM/DD/YYYY format)  
01/27/2005

**\* Recipient** (the organization or person where the disclosure went)  
Name: Law Offices of Joe Gibbs  
Address: 1411 Jefferson Davis, Arlington, VA 20220  
Phone:  
Contact Person:

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)


## Disclosures

# Amending Disclosures (6 of 6)

6. Scroll to the bottom of the screen and place a check in the **Improper Disclosure** checkbox
7. Enter a description of the Improper Disclosure and mitigation
8. Click on the **Update** button

**Disclosure Comments** *(the INTERNAL comments for this disclosure - these do NOT show up in the Protected Health Information disclosure report)*

**Improper Disclosure** *(checked if this disclosure occurred improperly)*


☒ 

**Improper Disclosure Description** *(the details about the improper disclosure)*

sent to wrong address

**Improper Disclosure Mitigation** *(the details about how the improper disclosure was mitigated)*

Privacy Officer spoke with patient.

**Update** 

## Disclosures

# Summary

---

- You should now be able to:
  - Record a request for disclosure as a Regular User
  - Record a disclosure as a Privacy Specialist
  - Approve/deny the disclosure
  - Amend a disclosure



# **Accounting of Disclosures**

## Accounting of Disclosures

# Objectives

---

- Once you have completed this lesson, you will be able to:
  - Record a request for an accounting of disclosures
  - Approve/deny a request for an accounting of disclosures
  - Generate an accounting of disclosures report

# Recording a Request (1 of 9)

---

- An individual has a right to receive an accounting of disclosures of protected health information made by a covered entity in the 6 years prior to the date that the accounting is requested
  - DoD 6025.18-R Chapter 13
- Regular Users and Privacy Specialists can record a request for an accounting of disclosures
- Only Privacy Specialists can approve or deny the request

# Recording a Request (2 of 9)

1. Select the **Requests** Tab
2. Select **Create New Request** hyperlink and/or click on the radio button for **Disclosure Accounting**
3. Click on the **Next** button

The screenshot shows a web application interface for recording requests. At the top, a navigation bar includes the date 'Thursday, January 27, 2005' and links for 'Patient Search' and 'Logoff'. Below this is a tabbed menu with 'Patient', 'User', 'Admin', 'Requests', and 'Requester'. The 'Requests' tab is selected, indicated by a red arrow. On the left, a sidebar shows 'Current Request: None' and two links: 'Create New Request' (circled in red) and 'Search for a request'. The main content area is titled 'Create New Request' and contains a section 'Select Request Type' with three radio buttons: 'Complaint', 'Disclosure', and 'Disclosure Accounting' (which is selected and boxed in red). At the bottom of the form is a 'Next' button, also indicated by a red arrow.

# Accounting of Disclosures

## Recording a Request (3 of 9)

4. Search for or select the patient
5. Click on the **OK** button

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Patient** | User | Admin | Requests | Requester

**Current Request:**  
Disclosure Accounting

**Select Patient** (1) | **Select Requester** (2) | **Request Details** (3) | **Request Action** (4)

☐ Create New Request  
☐ Search for a Request

### Patient Search

**Use the current person:**

**Name:** Joe Smith  
**SSN #:** 121131414  
**Birth Date:** 07-05-1968  
**Address:** 23 King St., Charleston, SC 84536

- OR -

**Search for another person:**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

# Accounting of Disclosures

## Recording a Request (4 of 9)

### 6. Select the requester (patient is requesting an accounting of disclosures)

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Patient** **User** **Admin** **Requests** **Requester**

**Current Request:**  
Disclosure Accounting

**Select Patient** **Select Requester** **Request Details** **Request Action**

① ② ③ ④

☐ Create New Request  
☐ Search for a Request

### Requester Search

Choose one of the following options:

**A. Select the Patient** (the request is being made by the Patient themselves)

Smith, Joe J

**B. Select a Third-Party Organization** (a third-party requester, such as a law enforcement agency or insurance company)

Law Offices of Joe Gibbs, 1411 Jefferson Davis, Arlington, VA 20220

**C. Search for a Person** (search for another person, or add a new one\*)

**Name** (Last) (First) An "\*" may be used as a wildcard.

,

**System ID** (the identification number created by this system for the person)

**FMP-SSN** (an external identifier for the person)

☒ Include Patient Records  
☒ Include Non-Patient Records

**D. Search for an Organization** (search for another organization, or add a new one\*)

**Name** (All or part of the name of the organization. An "\*" may be used as a wildcard.)

## Accounting of Disclosures

# Recording a Request (5 of 9)

7. Confirm requester and recipient details (patient is requester)
8. Click on the **Next** button

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Request:**  
Disclosure Accounting

[Select Patient](#) [Select Requester](#) [Request Details](#) [Request Action](#)

① ② ③ ④

[Create New Request](#)  
[Search for a Request](#)


### Confirm Requester and Recipient Details

**Patient:** Joe J Smith  
**Date of Birth:** 1968-07-05  
**SSN:** 121131414  
**Address:** 23 King St., Charleston, SC 84536

**Requester:** Joe J Smith [change](#)  
**Address:**  [Add New](#)

**Recipient:** [Same as requester](#)  
[set a different recipient](#)

[Back](#) [Next](#)



# Recording a Request (6 of 9)

### 9. Enter the Request Details: (details of the request, identity verification, authority verification)

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Request:**  
Disclosure Accounting

■ Create New Request  
■ Search for a Request

Select Patient (1) Select Requester (2) **Request Details (3)** Request Action (4)

#### Request Details

**Details of the Request** (requester's comments, or instructions about this request)

Patient is requesting an accounting of disclosures.

**Requester Identity Verified** (was the requester's identity verified?)

Social Security Number

**Description of Requester Identity Verification** (if the requester's identity was verified, how was it verified?)

Military ID

**Requester Authority Verified** (was the requester's authority to access information verified?)

Patient is Requester

**Description of Requester Authority Verification** (if the requester's authority was verified, how was it verified?)

Patient is requester



## Accounting of Disclosures

# Recording a Request (7 of 9)

10. Scroll down the screen and enter: (Information start and end date, request format, and request classification)
11. Click on the **Next** button

**Requester Authority Verified** *(was the requester's authority to access information verified?)*  
Patient is Requester

**Description of Requester Authority Verification** *(if the requester's authority was verified, how was it verified?)*  
Patient is requester

**Information Start Date** *(the start date for the information in MM/DD/YYYY format)*  
12/15/2004

**Information End Date** *(the end date for the information in MM/DD/YYYY format)*  
01/20/2005

**Request Format** *(the format in which this request has been received)*  
Received Request in Writing

**Request Classification** *(an optional classification for this request)*  
Attorney

Back Next

## Accounting of Disclosures

# Recording a Request (8 of 9)

12. Enter in the Request Action details
13. From the Action drop-down box, select the appropriate person to route the request to
14. Click on the **Save** button

Thursday, January 27, 2005 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

**Current Request:**  
Disclosure Accounting

Select Patient Select Requester Request Details **Request Action**

1 2 3 4

Create New Request  
Search for a Request

**Request Action**

**Patient**  
**Name:** Joe Smith  
**SSN #:** 121131414  
**Birth Date:** 07-05-1968  
**Address:** 23 King St., Charleston, SC 84536

**Requester/Recipient**  
**Name:** Joe J Smith  
**Address:** 23 King St., Charleston, SC 84536

**Details of the Request** (requester's comments about the scope of this request)  
Patient is requesting an accounting of disclosures.

**Approved Part** (for partially approved requests, describe part of request that was approved)

**Denied Part** (for partially denied requests, describe part of request that was denied)

**Action** (action for this request)  
Route to My Worklist

Back Save

# Recording a Request (9 of 9)

- The Request Summary screen will display

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Request:**  
Disclosure Accounting

Summary  
History  
Documents  
Request Details  
Request Action

[Create New Request](#)  
[Search for a Request](#)

### Request Summary

**Patient**  
**Name:** Joe J Smith  
**SSN #** 121131414  
**Birth Date:** 07-05-1968  
**Address:** 23 King St., Charleston, SC 84536

**Requester/Recipient**  
**Name:** Joe J Smith  
**Address:** 23 King St., Charleston, SC 84536

**Request Status:** Routed Request For Acceptance  
**Request Creation Date:** 01/27/2005 at 04:28:01 PM EST  
**Request Last Update Date:** 01/27/2005 at 04:28:01 PM EST

Other Request Details	
Description	Details
Request Type	Disclosure Accounting
Details of the Request	Patient is requesting an accounting of disclosures.
Start Date	12/15/2004
End Date	01/20/2005
Authority Verified	Patient is Requester
Verify Authority Text	Patient is requester

# Approving/Denying a Request (1 of 4)

---

- Once a request for an accounting of disclosures has been recorded, a Privacy Specialist must approve or deny the request
- Once routed, the request will display in the Privacy Specialist's work list

## Accounting of Disclosures

# Approving/Denying a Request (2 of 4)

1. Select the **User** tab
2. Select **My Worklist** hyperlink
3. Select the **Edit** hyperlink for that disclosure accounting that you will approve or deny

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

**Navigation Tabs:** Patient | **User** | Admin | Requests | Requester

**Current User:** Wilson, James  
US TMA

**Left Menu:** My Profile | My Request | **My Worklist** | [Switch organizations](#)

### User Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
<a href="#">edit</a> 85	308	Request Acceptance (Disclosure Accounting)		Smith, Joe J	Smith, Joe J	Action Pending	01/27/2005

### Naval Hospital Worklist

Activity Instance ID	Request Session ID	Activity ID	Source	Patient	Requester	Status	Creation Date
There are no activities for this queue							

## Accounting of Disclosures

# Approving/Denying a Request (3 of 4)

- The Edit Activity Details screen will display
4. Select **Accepted** or **Denied** from the Activity Status drop-down box
  5. Click on the **Update** button

Thursday, January 27, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Request:** Disclosure Accounting

**Edit Activity Details**

**Patient**  
**Name:** Joe Smith  
**SSN #:** 121131414  
**Birth Date:** 07-05-1968  
**Address:** 23 King St., Charleston, SC 84536

**Requester/Recipient**  
**Name:** Joe J Smith  
**Address:** 23 King St., Charleston, SC 84536

**Instructions**  
Request Acceptance (Disclosure Accounting)

**Activity Status** (new activity status code )  
Accepted  
Action Pending  
Accepted  
Denied  
Cancelled  
Route to Privacy Specialist  
Route to Other User  
denied part (for partially approved requests, describe part of request that was denied)

**Comments** (enter details about this activity)

Update

## Accounting of Disclosures

# Approving/Denying a Request (4 of 4)

- The Disclosure Accounting Request screen will display with the approved accounting of disclosures

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Request:**  
Disclosure Accounting

Summary  
History  
Documents  
Request Details  
Request Action

☐ Create New Request  
☐ Search for a Request

### Disclosure Accounting Request

**Reportable Disclosures (checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)**

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	286	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	137	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	100	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

### Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
<u>26</u>	The specific disclosure of type <b>Law Enforcement Purposes</b> that occurred on <b>07/27/2004</b> with a disclosure ID of <b>137</b>		07/27/2004	07/27/2004	

# Generating an Accounting of Disclosures Report (1 of 4)

---

- An accounting of disclosures report is a summary of all of the disclosures made for a particular patient
  - Pending disclosures will not display in the report
- Once a request has been approved, an accounting of disclosures report can be generated
- The Privacy Specialist has the option to route the report back to the originator



# Generating an Accounting of Disclosures Report (2 of 4)

1. From the Disclosure Accounting Request screen, click on the **Create** button to generate the report

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Request:**  
Disclosure Accounting

Summary  
History  
Documents  
Request Details  
Request Action

- Create New Request
- Search for a Request


### Disclosure Accounting Request

**Reportable Disclosures (checked disclosures will be included in the disclosure accounting report, suspended disclosures are highlighted in red)**

Include	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="checkbox"/>	286	01/27/2005	Law Enforcement Purposes	US TMA	Law Offices of Joe Gibbs	Complete Health Record(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	137	07/27/2004	Law Enforcement Purposes	325th Medical Group	Joe J Smith	Laboratory Test(s)	Law Enforcement	Complete
<input checked="" type="checkbox"/>	100	07/20/2004	Research Purposes	325th Medical Group	Home of Michele	History and Physical Examination, Progress Notes	Medical	Complete

### Disclosures Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
<u>26</u>	The specific disclosure of type <b>Law Enforcement Purposes</b> that occurred on <b>07/27/2004</b> with a disclosure ID of <b>137</b>		07/27/2004	07/27/2004	

 [Create](#)

# Generating an Accounting of Disclosures Report (3 of 4)

2. Select the [Protected Health Information Disclosure Report](#) hyperlink to create the report
3. If you want to route the completed request back to the originator, place a check in the box and click on [Confirm](#)

The screenshot shows a web application interface for generating a report. At the top, there is a header bar with the date "Thursday, January 27, 2005" and links for "Patient Search" and "Logoff". Below the header, there are tabs for "Patient", "User", "Admin", "Requests", and "Requester". The "Requests" tab is selected. On the left side, there is a sidebar with a "Current Request:" section showing "Disclosure Accounting". Below this, there are links for "Summary", "History", "Documents", "Request Details", and "Request Action". At the bottom of the sidebar, there are links for "Create New Request" and "Search for a Request". The main content area is titled "Disclosure Accounting Request". It contains a link for "Disclosure Report" (which is circled in red) and a link for "Protected Health Information Disclosure Report" (which is also circled in red). Below these links, there is a section titled "Route Completed Request to Originator" with a checkbox and a "Confirm" button (both of which are enclosed in a red box).

Thursday, January 27, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Request:**  
Disclosure Accounting

**Disclosure Accounting Request**

[Disclosure Report](#) (click on the link below to view or print the document)

[Protected Health Information Disclosure Report](#)

**Route Completed Request to Originator** (route to the request creator for acknowledgement & document preparation)

☐

Confirm

[Create New Request](#)  
[Search for a Request](#)

# Generating an Accounting of Disclosures Report (4 of 4)

- The Accounting of Disclosures Report will display

The screenshot shows a web browser window displaying a "Protected Health Information Disclosure Report". The browser's address bar is empty, and the page title is "Protected Health Information Disclosure Report". The report is prepared for Joe J Smith, requested from US TMA, and generated on 01-27-2005. The report contains a table with the following information:

Disclosure ID:	286
Date:	2005-01-27
Disclosure Type:	Law Enforcement Purposes - Law Enforcement Purposes
Disclosure Purpose:	Law Enforcement
Disclosed Health Information:	Complete Health Record(s)
Disclosure Originated From:	US TMA Five Skyline Place, 5111 Leesburg Pike, Falls Church, VA 22041-3206
Disclosure Recipient:	Law Offices of Joe Gibbs 1411 Jefferson Davis, Arlington, VA 20220
Disclosure Requester:	Smith, Joe J 23 King St., Charleston, SC 84536

Below the table, there is a section for "Disclosure ID: 137".

## Accounting of Disclosures

# Summary

---

- You should now be able to:
  - Record a request for an accounting of disclosures
  - Approve/deny a request for an accounting of disclosures
  - Generate an accounting of disclosures report

# **Accounting Suspensions**

# Accounting Suspensions

## Objectives

---

- Upon completion of this lesson, you will be able to:
  - Create an accounting suspension

# Creating a Suspension (1 of 7)

---

- The covered entity shall temporarily suspend an individual's right to receive an accounting of disclosures to a health oversight agency or law enforcement official...DoD 6025.18-R C13.1.2.1
- Two types of disclosures can be suspended:
  - Law enforcement purposes
  - Health oversight activities
- Privacy Specialists have the ability to enter an accounting suspension in two ways
  - Specific disclosure
  - Type of disclosure
- Once entered, the suspension can be viewed by all users

## Accounting Suspensions

# Creating a Suspension (2 of 7)

1. Search for and select a patient record
2. Select the [Accounting Suspensions](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

### Summary

**Summary Item Filters**

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary  
Requests  
Records Disclosure  
**Accounting Suspensions**  
Disclosures Restrictions  
Authorization  
Patient Profile

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Version: 2.24

[Patient Search](#)



# Accounting Suspensions

## Creating a Suspension (3 of 7)

### 3. Select the [Specific Disclosure](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

**Accounting Suspensions**

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
---------------	----------------------	------------	------------	----------	----------

**Create New Accounting Suspension**

For the current Patient, suspend their disclosure accounting rights for a **specific disclosure**. Use this to suspend a single disclosure.

For the current Patient, suspend their disclosure accounting rights for a **type of disclosure**. Use this to suspend more than one disclosure of a particular type.

[Patient Search](#)

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Version: 2.24

## Accounting Suspensions

# Creating a Suspension (4 of 7)

4. Click on the radio button for the disclosure you want to suspend
5. Enter the suspension details: (requesting statement and form, justification, and start and end date)

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSN: 30-  
211128767

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Requests  
Authorization  
Patient Profile

**Accounting Suspension**

**Patient Disclosures (Suspended disclosures are highlighted in red)**

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="radio"/>	268	01/25/2005	Law Enforcement Purposes	US TMA	Peter Kramer	Complete Health Record (s)	Law Enforcement	Complete

**\* Requesting Statement** (The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)

as requested by attorney

**Form of Requesting Statement** (The form of the statement requesting suspension)

Written ☒ Oral ☐

**\* Justification** (mandatory comments explaining the justification for the Patient suspension)

directed by attorney

**\* Start Date** (The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)

01/11/2005

**\* End Date** (The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)

01/26/2005

## Accounting Suspensions

# Creating a Suspension (5 of 7)

6. Scroll to the bottom of the screen and click the **Save** button

**Form of Requesting Statement** *(The form of the statement requesting suspension)*

Written ☒ Oral ☐

**\* Justification** *(mandatory comments explaining the justification for the Patient suspension)*

directed by attorney

**\* Start Date** *(The start date from which the disclosure will not be reported to the Patient in MM/DD/YYYY format)*

01/30/2005

**\* End Date** *(The end date after which time the Patient will be able to access the disclosure in MM/DD/YYYY format)*

02/05/2005

**Identifier** *(The OPTIONAL identifier for the suspension, could be a case number, warrant number, subpoena ID, etc.)*

**Comments** *(OPTIONAL general comments about or for the Patient)*

Save

## Accounting Suspensions

# Creating a Suspension (6 of 7)

### 7. Select the [Summary](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN: 30-  
211128767

**Accounting Suspension**

**Patient Disclosures (Suspended disclosures are highlighted in red)**

Suspend	Disclosure ID	Date	Type	Origin	Receiving Entity	PHI	Purpose	Status
<input checked="" type="radio"/>	268	01/25/2005	Law Enforcement Purposes	US TMA	Peter Kramer	Complete Health Record (s)	Law Enforcement	Complete

**\* Requesting Statement** (The agency or official statement requesting the Patient suspension. If the request is oral, this must include the identity of the agency or official making the statement)

as requested by attorney

**Form of Requesting Statement** (The form of the statement requesting suspension)

Written ☒ Oral ☐

**\* Justification** (mandatory comments explaining the justification for the Patient suspension)

directed by attorney

[Patient Search](#)

## Accounting Suspensions

# Creating a Suspension (7 of 7)

8. Check the **Suspensions** checkbox
  9. Click on the **Display** button
- The Disclosure that you suspended will display in the Disclosure Accounting Suspensions section

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Summary

**Summary Item Filters** Display

☐ All ☐ Disclosures ☒ **Suspensions** ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

#### Disclosure Accounting Suspensions

Suspension ID	Suspended Disclosure	Identifier	Start Date	End Date	Comments
<u>88</u>	The specific disclosure of type <b>Law Enforcement Purposes</b> that occurred on <b>01/25/2005</b> with a disclosure ID of <b>268</b>		01/30/2005	02/05/2005	

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# Accounting Suspensions

## Summary

---

- You should now be able to:
  - Create an accounting suspension

# **Disclosure Restrictions**

# Objectives

---

- Upon completion of this lesson, you will be able to:
  - Record a disclosure restriction request
  - Approve or deny the disclosure restriction request
  - Generate an approval or denial letter to be sent to the requester



## Disclosure Restrictions

# Recording a Restriction (1 of 6)

---

- DoD 6025.18-R Chapter 10 describes the rights to request privacy protection for protected health information
  - Covered entity is not required to agree to such requests
  - Requests may be made orally or in writing, but must be documented
  - Covered entity must provide a response to the individual
- Privacy Specialists can record and approve or deny requests for disclosure restrictions
  - Once approved or denied, a letter with an explanation can be generated

## Disclosure Restrictions

# Recording a Restriction (2 of 6)

1. Select the **Patient** tab
2. Enter patient search criteria
3. Click on **Search**

Sunday, January 30, 2005 Patient Search Logoff

Patient **User** Admin Requests Requester

**Current Patient:** None

**Patient Search**

**FMP-SSSN** (Family Member Prefix and Sponsor SSN (in xx-xxx-xx-xxxx format))

-  -  -

- OR -

**by Name** (Last) (First)

,

- OR -

**by System ID** (the identifier created by this system for the person)

## Disclosure Restrictions

# Recording a Restriction (3 of 6)

4. Click on the radio button for the patient
5. Click on the **Select** button

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
None

**Patient Search Results**

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

**Search Results for FMP-SSN = [ \*30-211128767 ] (sorted by birth date)**

	ID	FMP	Name	SSN	Birth Date	Address
<input checked="" type="radio"/>	661	30	Kramer, Peter	234125689	1970-08-11	211 River Rd. Alexandria, VA 22454

FMP-SSN 30-211128767 (2005-01-25 to 2005-01-25)

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

## Disclosure Restrictions

# Recording a Restriction (4 of 6)

### 6. Select the [Disclosure Restrictions](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

**Summary**

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
**Disclosure Restrictions**  
Authorization  
Patient Profile

[Patient Search](#)

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## Disclosure Restrictions

# Recording a Restriction (5 of 6)

7. Click on the **New** button in the Disclosure Restrictions box

Sunday, January 30, 2005 [Patient Search](#) [Logout](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

### Disclosure Restrictions

**Disclosures Restrictions**

ID	Type	Start Date	End Date	Outcome	Destination	Details
----	------	------------	----------	---------	-------------	---------

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

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## Disclosure Restrictions

# Recording a Restriction (6 of 6)

8. Enter Disclosure Restriction details: (Disclosure type, start and end date, destination, and details)
9. Select **Approved** or **Denied** from the Outcome drop-down box
10. Click on the **Save** button

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN: 30-211128767

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Disclosure Restriction

\* **Disclosure Type** (the type of disclosure to restrict)  
Medical Facility Patient Directories

\* **Start Date** (The start date from which US TMA will not share this information with identified party; in MM/DD/YYYY format)  
01/26/2005

**End Date** (The OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format)

\* **Restriction Destination** (to whom information is being restricted?)  
spouse

**Details of Restriction** (what information is being restricted?)  
all medical records

**Outcome** (Indicate whether request was approved or denied)  
Approved

Save

# Generating Correspondence (1 of 3)

---

- Once you have approved or denied the disclosure restriction you have the ability to generate an approval or denial letter
- The letter will be pre-populated with the information that you entered for that particular restriction

## Disclosure Restrictions

# Generating Correspondence (2 of 3)

- Once you have clicked on the **Save** button, the letters box will appear
- Select the **Title** hyperlink to access the letter

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Kramer, Peter  
08/11/1970  
FMP-SSSN:30-  
211128767

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Disclosure Restriction

**\* Disclosure Type** (the type of disclosure to restrict)  
Medical Facility Patient Directories

**\* Start Date** (The start date from which US TMA will not share this information with identified party; in MM/DD/YYYY format)  
01/26/2005

**End Date** (The OPTIONAL end date at which time US TMA will begin to share this information again; in MM/DD/YYYY format)

**\* Restriction Destination** (to whom information is being restricted?)  
spouse

**Details of Restriction** (what information is being restricted?)  
all medical records

**Outcome** (indicate whether request was approved or denied)  
Approved

[Update](#)

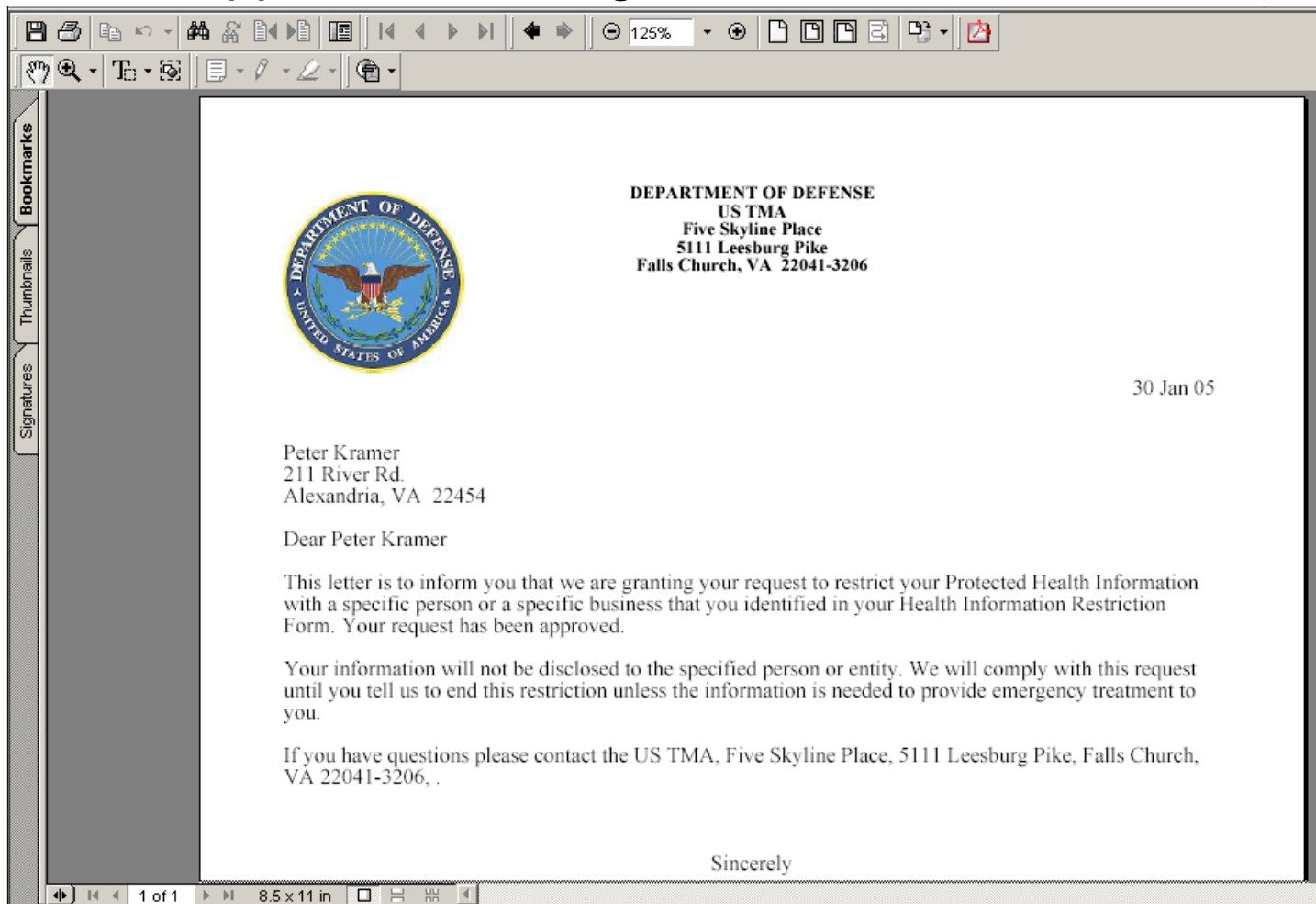
**Letters (Click on the link to view and print the document)**

ID	Title
401	<a href="#">Disclosure Restriction - Approval Letter</a>



# Generating Correspondence (3 of 3)

- The Approval letter is generated



## Disclosure Restrictions

# Summary

---

- You should now be able to:
  - Record a disclosure restriction request
  - Approve or deny the disclosure restriction request
  - Generate an approval or denial letter to be sent to the requester

# **Authorizations**

# Authorizations

## Objectives

---

- Upon completion of this lesson, you will be able to:
  - Create an authorization
  - Generate a DD Form 2870
  - Sign an authorization
  - Revoke an authorization

# Creating an Authorization (1 of 8)

---

- The MHS uses the DD Form 2870 (Authorization for Disclosure of Medical or Dental Information)
- Authorizes an individual or organization to disclose a patient's medical or dental information
- Once an authorization has been created, the DD Form 2870 can be downloaded from the Privacy Office website, or from the DoD Forms website
- Can be generated using PHIMT

## Authorizations

# Creating an Authorization (2 of 8)

1. Select the **Patient** tab
2. Search for and select the patient

Sunday, January 30, 2005 [Patient Search](#) [Logout](#)

**Patient** User Admin Requests Requester

**Current Patient:** None

**Patient Search Results**

Search Results for FMP-SSSN = [ \*20-121131414 ] (sorted by birth date)

ID	FMP	Name	SSN	Birth Date	Address
292	20	Smith, Joe J	121131414	1968-07-05	23 King St. Charleston, SC 84536

FMP-SSSN 20-121131414 (2004-07-20 to 2004-07-20)

Select

**Other options:**  
[Adjust your search criteria and try again.](#)  
[Create a new Patient record.](#)

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

## Authorizations

# Creating an Authorization (3 of 8)

### 3. Select the [Authorization](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN: 20-  
121131414

**Summary**

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☐ Authorizations ☐ Complaints

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosures Restrictions  
**Authorization**  
Patient Profile

[Patient Search](#)

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Version: 2.24

## Authorizations

# Creating an Authorization (4 of 8)

4. Select the **Authorization Type** from the drop-down box
5. Enter the authorization details: (reason for request, releasing organization, and recipient)

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Authorization

**Type** (the type of authorization to create)  
Standard Authorization

**Protected Health Information to be Released** (the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)  
entire medical record

**Reason for Request/Use of Medical Information** (a description of each purpose of the requested use or disclosure)

☐ Continued Medical Care  
☐ Insurance  
☐ Legal  
☒ Personal Use  
☐ Retirement/Separation  
☐ School

Other:  
patient authorizes his brother to have a copy of entire medical record.

**Releasing Organization** (Organization that released the authorization)  
USADC-Hospital

**Recipient** (the name, complete mailing address, phone and fax of the individual or class of individuals to receive the PHI)  
1100 Main Street



## Authorizations

# Creating an Authorization (5 of 8)

6. Scroll down the screen and enter: (authorization start and expiration date, treatment type, and treatment start and end date)
7. Place a check in the **Generate Authorization** checkbox
8. Click on the **Save** button

The screenshot shows a web form for creating an authorization. A red rectangular box highlights the following fields:

- Authorization Start Date** (the effective date of the authorization in MM/DD/YYYY format): 06/08/2004
- Authorization Expiration** (the expiration date of the authorization in MM/DD/YYYY format, an **Action Completed** may be used instead of a date): 06/08/2005
- Action Completed** (the expiration event for the authorization, such as "Upon completion of the investigation", an **Authorization Expiration** may be used instead of an action if known): [Empty text box]
- Treatment Type** (the type of Treatment): Outpatient and Inpatient
- Treatment Start Date** (the treatment or service start date in MM/DD/YYYY format): 03/01/2004
- Treatment End Date** (the treatment or service end date in MM/DD/YYYY format): [Empty text box]

Below the red box, the **Generate Authorization** checkbox is checked, and a red arrow points to the **Save** button.

**Generate Authorization** (generate Authorization for Disclosure form for printing purposes)

☒ Save

## Authorizations

# Creating an Authorization (6 of 8)

- The Signed Status and Revoked Status boxes on this screen indicate if the DD Form 2870 is signed or revoked

The screenshot displays a web form for creating an authorization. At the top left is an "Update" button. Below it, the "Signed Status" section is highlighted with a red circle. This section includes a checkbox labeled "Signed" (checked if the authorization is signed), a "Signed Date" field (the date that the authorization is signed in MM/DD/YYYY format) with a calendar icon, and a "Signed By Person" dropdown menu (the individual who signed the authorization) currently showing "Joe J Smith". Below this, the "Revoked Status" section is also highlighted with a red circle. It includes a checkbox labeled "Revoked" (checked if the authorization is revoked), a "Revoked Date" field (the date that the authorization was revoked in MM/DD/YYYY format) with a calendar icon, and a "Revoked By Person" dropdown menu (the individual who revoked the authorization) currently showing "Joe J Smith". At the bottom left is another "Update" button.

Update

**Signed Status**

**Signed** (checked if the authorization is signed)

☐

**Signed Date** (the date that the authorization is signed in MM/DD/YYYY format)

01/30/2005

**Signed By Person** (the individual who signed the authorization)

Joe J Smith

**Revoked Status**

**Revoked** (checked if the authorization is revoked)

☐

**Revoked Date** (the date that the authorization was revoked in MM/DD/YYYY format)

01/30/2005

**Revoked By Person** (the individual who revoked the authorization)

Joe J Smith

Update

## Authorizations

# Creating an Authorization (7 of 8)

- A note appears at the top of the screen indicating the authorization is saved and that only the “Signed” or “Revoked” status fields may be changed at this point

9. Select the [Summary](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Authorization**

**This authorization has been saved. Only the 'signed' and/or 'revoked' status fields (at the bottom of the page) can be updated.**

**Summary**  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

**Authorization Document** (the physical authorization document generated by the application)  
Standard Authorization (Document ID #402)

**Type** (the type of authorization to create)  
Standard Authorization

**Protected Health Information to be Released** (the part of the medical record to be released, such as "complete medical record", "pathology report", etc.)  
entire medical record

**Reason for Request/Use of Medical Information** (a description of each purpose of the requested use or disclosure)  
☐ Continued Medical Care

## Authorizations

# Creating an Authorization (8 of 8)

10. Place a check in the **Authorizations** checkbox

11. Click on the **Display** button

Sunday, January 30, 2005 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ **Authorizations** ☐ Complaints

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

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## Authorizations

# Generate DD Form 2870 (1 of 2)

- The new authorization will appear on the Summary screen
- Select the [authorization title](#) hyperlink to generate DD Form 2870

Sunday, January 30, 2005 Patient Search Logoff

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** Display  
☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

**Authorizations (Revoked authorizations are highlighted in red)**

ID	Title	Description	Signed	Expiration	Revoked
40	<a href="#">Standard Authorization</a>	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'		02/03/2006	
124	<a href="#">Standard Authorization</a>	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

## Authorizations

# Generate DD Form 2870 (2 of 2)

- DD Form 2870 in Adobe Acrobat format
2. You may print the form and request the patient's signature

The screenshot shows a PDF document titled "AUTHORIZATION FOR DISCLOSURE OF MEDICAL OR DENTAL INFORMATION". The form is displayed within a PDF viewer window. The form contains the following sections:

**AUTHORIZATION FOR DISCLOSURE OF MEDICAL OR DENTAL INFORMATION**

The purpose of this form is to provide the MTF/DTF/TRICARE Health Plan with a means to request the use and/or disclosure of an individual's protected health information. Guidelines regarding use of this form are contained in DOD Regulation 6025.18-R.

This form will not be used for authorization to disclose alcohol or drug abuse patient information from medical records or for authorization to disclose information from records of an alcohol or drug abuse treatment program. In addition, any use as an authorization to use or disclose psychotherapy notes may not be combined with another authorization except one to use or disclose psychotherapy notes.  
Privacy Act of 1974 applies

**PATIENT DATA**

Name (Last, First, MI) Smith, Joe, J	Date of Birth 07-05-1968	Patient SSN 121131414
Period of Treatment 01-11-2005- 01-11-2005	Type of Treatment: Outpatient	

**DISCLOSURE**

I authorize <u>USADC-Hospital</u> (Name of MTF/DTF) to release my patient information to recipient: <u>1100 Main Street</u> <u>Woodbridge, VA 22321</u>	Reason for Request/Use of Medical Information: Personal Use, patient authorizes his brother to have a copy of entire medical record.
Information to be Released: entire medical record	

# Signing an Authorization (1 of 5)

---

- Once an authorization has been entered, it needs to be signed by the patient for validation
- After the authorization is signed by the patient, a user has the ability to document the signature within the PHIMT

## Authorizations

# Signing an Authorization (2 of 5)

1. Select the authorization **ID** hyperlink to return to the detailed authorization record

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

[Patient](#) [User](#) [Admin](#) [Requests](#) [Requester](#)


**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN: 20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** [Display](#)  
☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

**Authorizations (Revoked authorizations are highlighted in red)**

ID	Title	Description	Signed	Expiration	Revoked
<a href="#">402</a>	<a href="#">Standard Authorization</a>	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'		02/03/2006	
<a href="#">24</a>	<a href="#">Standard Authorization</a>	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004





## Authorizations

# Signing an Authorization (3 of 5)

2. Scroll to the bottom of the page to the Signed Status box
3. Place a check in the Signed Status checkbox
4. Select the date and the authorizing person's identity from the drop-down box
5. Click on the **Update** button

The screenshot displays a web form for managing authorizations. The 'Signed Status' section is highlighted with a red rectangular border. It contains a checkbox labeled 'Signed' (checked if the authorization is signed) which is currently checked. Below this is a 'Signed Date' field (the date that the authorization is signed in MM/DD/YYYY format) with a text input showing '01/30/2005' and a calendar icon. The 'Signed By Person' field (the individual who signed the authorization) is a dropdown menu currently showing 'Joe J Smith'. Below the highlighted section is the 'Revoked Status' section, which includes an unchecked 'Revoked' checkbox, a 'Revoked Date' field (also showing '01/30/2005'), and a 'Revoked By Person' dropdown menu (also showing 'Joe J Smith'). At the bottom of the form, there is a grey 'Update' button, which is pointed to by a large red arrow.

**Signed Status**

**Signed** (checked if the authorization is signed)

☒

**Signed Date** (the date that the authorization is signed in MM/DD/YYYY format)

01/30/2005

**Signed By Person** (the individual who signed the authorization)

Joe J Smith

**Revoked Status**

**Revoked** (checked if the authorization is revoked)

☐

**Revoked Date** (the date that the authorization was revoked in MM/DD/YYYY format)

01/30/2005

**Revoked By Person** (the individual who revoked the authorization)

Joe J Smith

Update

## Authorizations

# Signing an Authorization (4 of 5)

6. Select the [Summary](#) hyperlink
7. Place a check in the Authorizations checkbox
8. Click on the [Display](#) button

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

**Summary**  
An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

[Summary](#)  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

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[Patient Search](#)

## Authorizations

# Signing an Authorization (5 of 5)

- You will now see that the authorization indicates that it has been signed

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Summary

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

**Authorizations (Revoked authorizations are highlighted in red)**

ID	Title	Description	Signed	Expiration	Revoked
<a href="#">402</a>	<a href="#">Standard Authorization</a>	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	
<a href="#">124</a>	<a href="#">Standard Authorization</a>	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

# Revoking an Authorization (1 of 5)

---

- DoD 6025.18-R, Section C5.2.5
- Privacy Specialists can revoke an authorization when instructed by a patient in writing
  - Except if:
    - The covered entity has taken action in reliance thereon
    - Insurance coverage

## Authorizations

# Revoking an Authorization (2 of 5)

1. Select the authorization ID hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logout](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-  
121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Summary

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

**Authorizations (Revoked authorizations are highlighted in red)**

ID	Title	Description	Signed	Expiration	Revoked
<a href="#">402</a>	<a href="#">Standard Authorization</a>	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	
<a href="#">124</a>	<a href="#">Standard Authorization</a>	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004

## Authorizations

# Revoking an Authorization (3 of 5)

2. Scroll to the bottom of the screen to the Revoked Status box
3. Place a check in the Revoked check box
4. Select the date and the revoking person's identity in the drop-down box
5. Click on the **Update** button

**Signed Status**

**Signed** (checked if the authorization is signed)  
☒

**Signed Date** (the date that the authorization is signed in MM/DD/YYYY format)  
01/30/2005

**Signed By Person** (the individual who signed the authorization)  
Joe J Smith

**Revoked Status**

**Revoked** (checked if the authorization is revoked)  
☒

**Revoked Date** (the date that the authorization was revoked in MM/DD/YYYY format)  
01/30/2005

**Revoked By Person** (the individual who revoked the authorization)  
Joe J Smith

**Update**

## Authorizations

# Revoking an Authorization (4 of 5)

6. Select the [Summary](#) hyperlink to view the authorization
7. Place a check in the Authorizations checkbox
8. Click on the [Display](#) button

The screenshot shows a web application interface for patient management. At the top, there is a date "Sunday, January 30, 2005" and links for "Patient Search" and "Logoff". Below this is a navigation bar with tabs for "Patient", "User", "Admin", "Requests", and "Requester". On the left side, there is a "Current Patient" section for "Smith, Joe J" with birth date "07/05/1968" and FMP-SSSN "20-121131414". Below this is a list of links: "Summary" (circled in red), "Requests", "Record Disclosure", "Accounting Suspensions", "Disclosure Restrictions", "Authorization", and "Patient Profile". The main content area is titled "Summary" and contains a message: "An alternate address exists for this patient." Below this is a "Summary Item Filters" section with a "Display" button (indicated by a red arrow) and a row of checkboxes: "All", "Disclosures", "Suspensions", "Restrictions", "Reports", "Letters", "Authorizations" (checked and highlighted with a red box), and "Complaints". At the bottom, there is a copyright notice: "Copyright © New Governance, Inc. 2000-2004, ALL RIGHTS RESERVED" and "Version: 2.24".

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN:20-121131414

[Summary](#)  
[Requests](#)  
[Record Disclosure](#)  
[Accounting Suspensions](#)  
[Disclosure Restrictions](#)  
[Authorization](#)  
[Patient Profile](#)

**Summary**

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

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[Patient Search](#)

## Authorizations

# Revoking an Authorization (5 of 5)

- The revoked authorization is highlighted in red

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User Admin Requests Requester

**Current Patient:**  
Smith, Joe J  
07/05/1968  
FMP-SSSN: 20-121131414

Summary  
Requests  
Record Disclosure  
Accounting Suspensions  
Disclosure Restrictions  
Authorization  
Patient Profile

[Patient Search](#)

### Summary

An alternate address exists for this patient.

**Summary Item Filters** [Display](#)

☐ All ☐ Disclosures ☐ Suspensions ☐ Restrictions ☐ Reports ☐ Letters ☒ Authorizations ☐ Complaints

**Authorizations (Revoked authorizations are highlighted in red)**

ID	Title	Description	Signed	Expiration	Revoked
<a href="#">402</a>	<a href="#">Standard Authorization</a>	For disclosures of 'entire medical record' to '1100 Main Street Woodbridge, VA 22321'	01/30/2005	02/03/2006	01/30/2005
<a href="#">124</a>	<a href="#">Standard Authorization</a>	For disclosures of 'medical record' to 'Jenny Smith 152 Brook Land Charleston SC 29404'	07/20/2004	07/27/2005	07/20/2004



# Authorizations

## Summary

---

- You should now be able to:
  - Create an authorization
  - Generate a DD Form 2870
  - Sign an authorization
  - Revoke an authorization

# **Administrative Summary**

## Administrative Summary

# Objectives

---

- Upon completion of this lesson, you will be able to:
  - View administrative summary reports

# Administrative Summary Reports (1 of 4)

---

- Administrative summaries provide a visual representation by organization of:
  - Disclosures over a 12 month period
  - All requests by type
  - All requests over a 12 month period
  - Top recipients of disclosures
  - Top requesters for all requests
- Performed by Privacy Specialists and User Admins

# Creating Administrative Summary Reports (2 of 4)

1. Select the [Admin](#) Tab
2. Select the [Administrative Summary](#) hyperlink

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

Patient User **Admin** Requests Requester

**Current Admin:**  
Wilson, James  
US TMA

**Administrative Summary**

Origin Organizations: -- Select --

Administrative Summary  
Administrative Statistics  
Organizations  
Queue Users  
Disclosure Imports  
Disclosure Imports History

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# Creating Administrative Summary Reports (3 of 4)

3. Select your Organization from the drop-down box

Sunday, January 30, 2005 [Patient Search](#) [Logoff](#)

**Administrative Summary**

**Current Admin:**  
Wilson, James  
US TMA

**Origin Organizations**

-- Select --

-- Select --

All

10th MED GROUP-USAF ACADEMY CO

10th Med GROUP- PETERSON AFB

11TH MED GRP-BOLLING

11th Wing

121ST GEN HOSP SEOUL

12th MED GRP-RANDOLPH

14th MED GRP-COLUMBUS

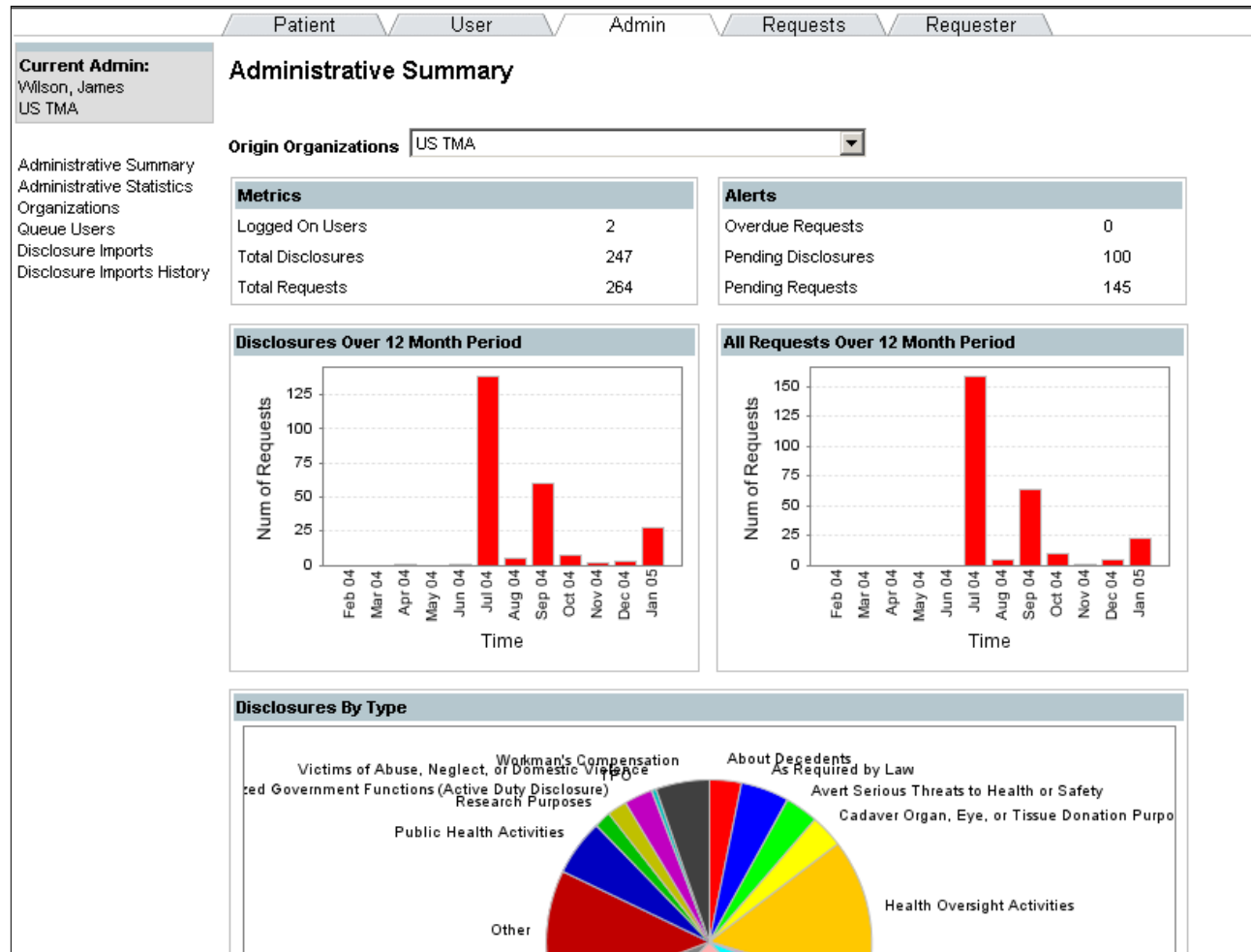
15th MED GRP-HICKAM

16th MED GRP-HURLBURT FIELD

ITS RESERVED

# Creating Administrative Summary Reports (4 of 4)

- The Administrative Summary reports will display



## Administrative Summary

# Summary

---

- You should now be able to:
  - View administrative summary reports



# Presentation Summary

---

- You should now be able to:
  - Describe the PHIMT application
  - Identify the user roles and permissions
  - Perform the functions of the User Admin, Privacy Specialist, and Regular User within the PHIMT

# Resources

---

- DoD 6025.18-R, “DoD Health Information Privacy Regulation”, January 2003
- [www.tricare.osd.mil/tmaprivacy/HIPAA.cfm](http://www.tricare.osd.mil/tmaprivacy/HIPAA.cfm)
- [privacymail@tma.osd.mil](mailto:privacymail@tma.osd.mil) for subject matter questions
- [hipaasupport@tma.osd.mil](mailto:hipaasupport@tma.osd.mil) for tool related questions
- <http://www.tricare.osd.mil/tmaprivacy/Mailing-List.cfm> to subscribe to the TMA Privacy Office E-News
- Service HIPAA Privacy representatives



HEALTH AFFAIRS



# Please fill out your critique

***Thanks!***

